

# Travel Intentions Study Report Wave 6 (May 2005)

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Presented to:

Ontario Ministry Of Tourism And Recreation  
Ontario Tourism Marketing Partnership Corp.

June 29, 2005

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# Background

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- This study is intended to measure intent to travel to Ontario and specific Ontario destinations within key US and domestic markets.
- Information will be used to:
  - gauge the impact of negative events on travel to Ontario;
  - forecast demand to assist with industry planning;
  - provide information to assist with messaging and targeting of promotional communications and other marketing initiatives.
- This presentation focuses on findings in the following areas:
  - gauging Summer demand for Ontario as a travel destination in key domestic and US markets;
  - obtaining an early perspective on Fall travel intention;
  - understanding the factors affecting demand;
  - highlighting shifts in impressions of Ontario that have occurred over time;
  - examining issues related to possible new passport requirements for travel between Canada and the U.S.

# Methodology

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- Interviewing was conducted by telephone among individuals 18 years or older.
- The survey for this sixth wave was essentially confined to the month of May, 2005. This follows five seasonal waves conducted in 2003/2004 and in February 2005.
- A stringent methodology was used:
  - modified random digit dialing using a seed sample drawn from up-to-date telephone listings;
  - Multiple callbacks (up to 8 calls to achieve a completion once contact is made with the household);
  - One additional callback to “soft” refusals.

## Methodology (Cont'd)

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- The Trodahl-Carder methodology was used to select a single age-eligible respondent to interview in each household.
- The sample was assigned disproportionately by market as follows:

	<u>Assigned</u>	<u>Achieved In Wave 6</u>
<b>Canada:</b>		
Toronto CMA	400	413
Ottawa CMA	200	191
Hamilton CMA	80	80
Ontario 100 – 499M	180	196
Ontario 30 – 99M	80	88
Ontario 10 – 29M	60	63
Ontario under 10M	100	90
Montreal CMA	300	344
Quebec City CMA	200	201
Winnipeg CMA	300	307

# Methodology (Cont'd)

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	<u>Assigned</u>	<u>Achieved In Wave 6</u>
<b>United States:</b>		
Rochester MSA	300	308
Buffalo — Niagara Falls MSA	300	288
Syracuse MSA	200	194
New York City PMSA	181	179
Nassau — Suffolk PMSA	43	43
Other NY State	87	69
Chicago PMSA	230	222
Other Illinois	70	74
Indianapolis MSA	90	91
Other Indiana	55	53
Boston NECMA	150	145
Mass. Ex-Boston	31	36

# Methodology (Cont'd)

	<u>Assigned</u>	<u>Achieved In Wave 6</u>
<b>United States: (Cont'd)</b>		
Detroit PMSA	300	314
Northern Michigan PMSAs/MSAs	84	88
Other Michigan	64	70
Minneapolis—St. Paul UA	200	186
Other Minnesota	41	41
Cleveland—Lorain—Elyria PMSA	200	194
Cincinnati PMSA	100	120
Columbus MSA	104	104
Other Ohio	60	59
Pittsburgh MSA	300	306
Philadelphia PMSA	150	157
Other Pennsylvania	77	78
Milwaukee—Waukesha PMSA	200	202
Other Wisconsin	67	67
Washington DC PMSA	100	107
Maryland Ex. Washington DC	118	107

# Methodology (Cont'd)

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- In total, 5,875 interviews were completed:
  - 1,973 in Canada;
  - 3,902 in the United States.
- As part of data processing, the sample was weighted in three stages using the most recently available census information from each country:
  - household size within market;
  - household conversion weight (to correct for differential selection probabilities within household due to variations in number of age-qualified individuals within each);
  - age within gender within market.

# Presentation Outline

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- Travel Incidence Trends
- General Travel Attitudes and Planning
- Travel Intentions
  - Next Season and Season After Next
  - By Specific Source Market
  - By Trip Purpose
  - Conferences and Conventions
- Ontario Experience and Interest
- Travel Motivations and Barriers
- Impressions Of Ontario
- Passport Issues

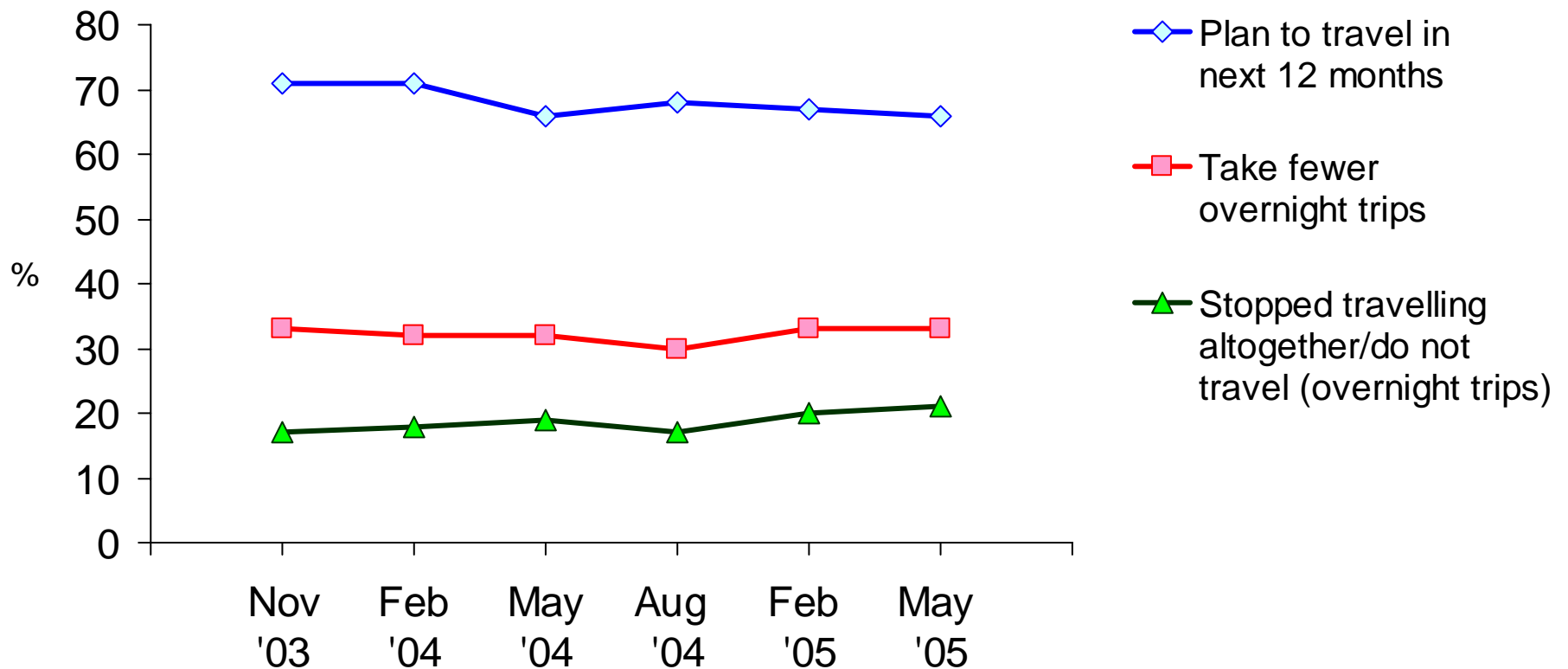
# Propensity To Travel & Trip Planning



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# Trend in general travel intentions and propensity to travel

Percent of **Americans**

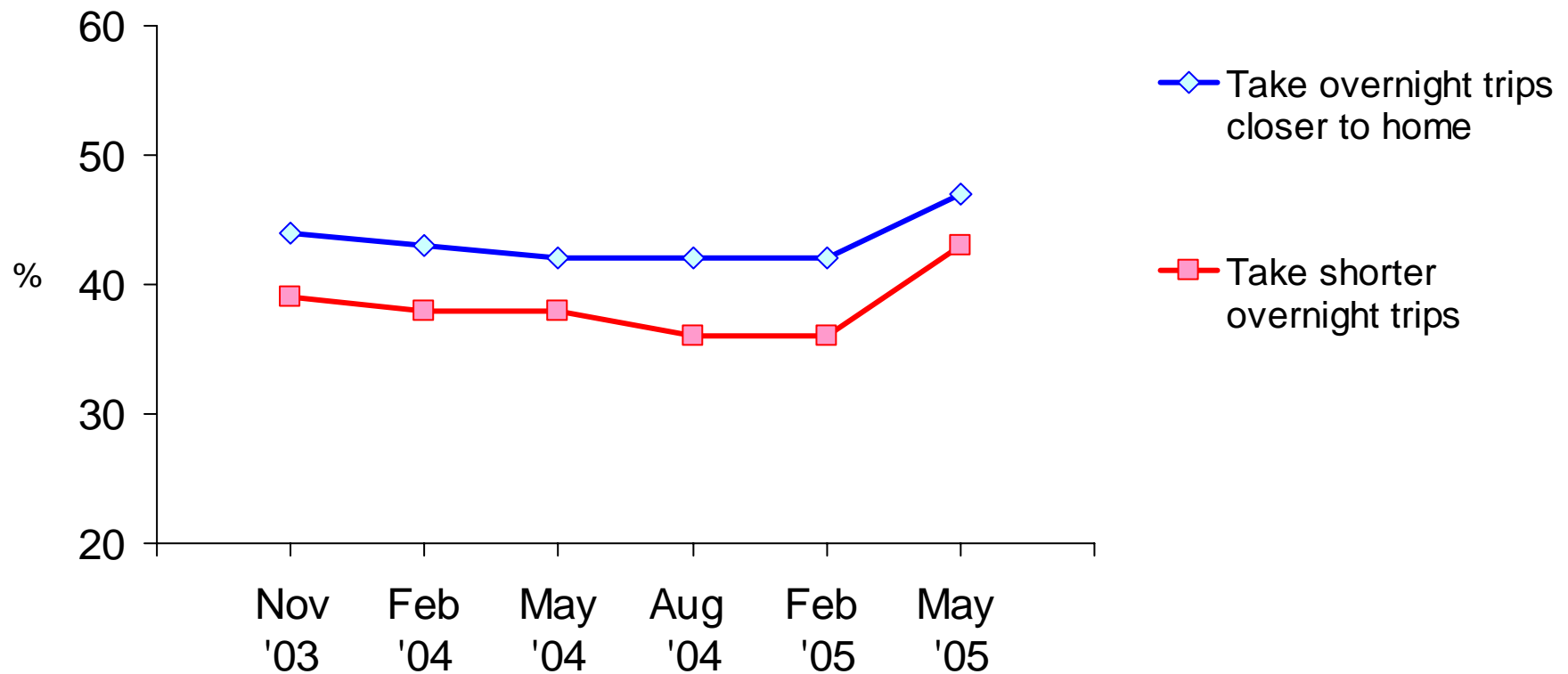


Q. Are you considering taking an out-of-town trip of one or more nights away from home in the next 12 months?

Q. How, if at all, have your travel plans changed over the past two years? Are you inclined to... ?

# Trend in duration and distance of overnight trips

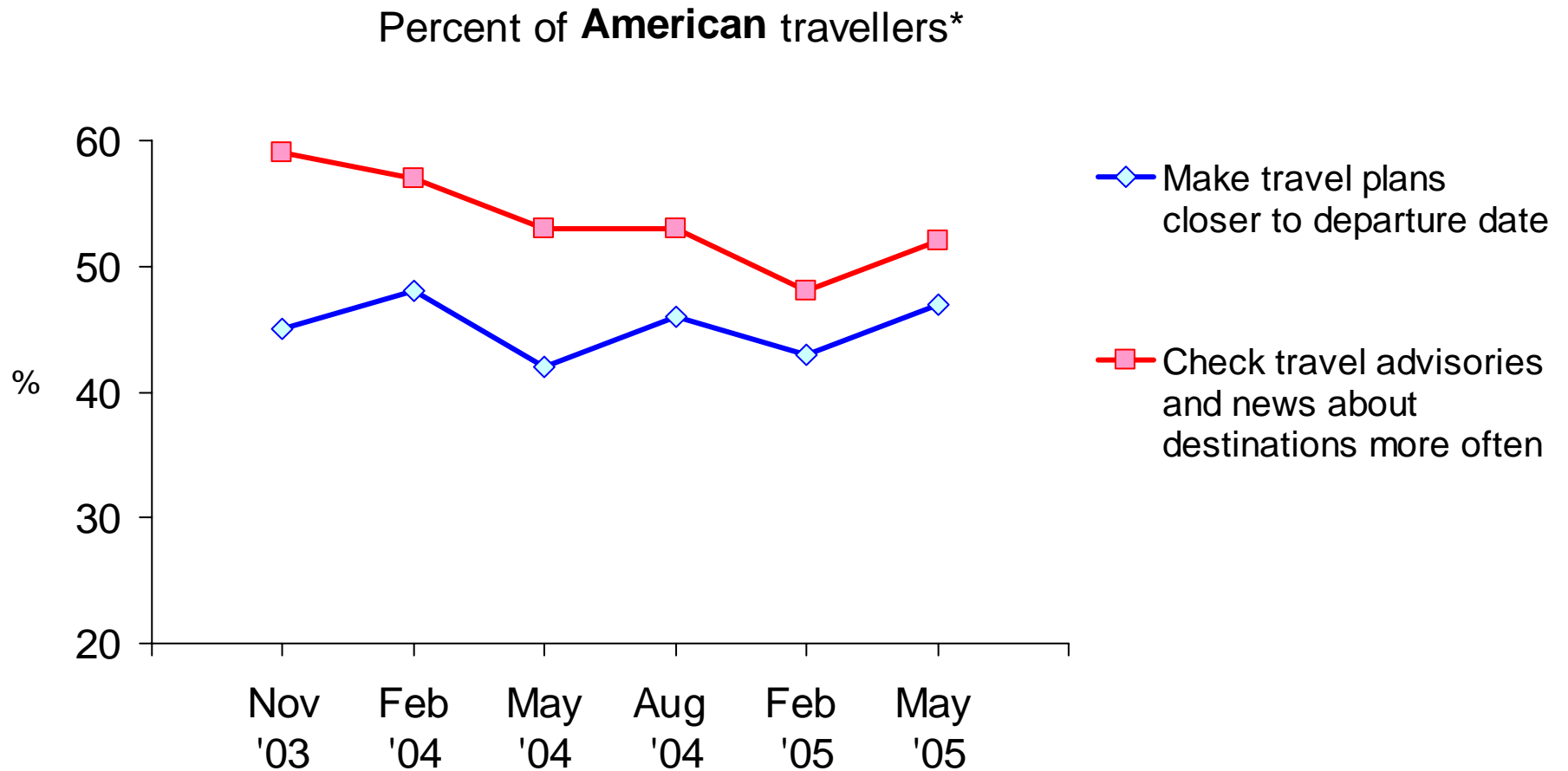
Percent of **American** travellers\*



\* Have taken an overnight trip in the past two years or will take one in the next 12 months.

Q. How, if at all, have your travel plans changed over the past two years? Are you inclined to... ?

# Trend in overnight trip planning

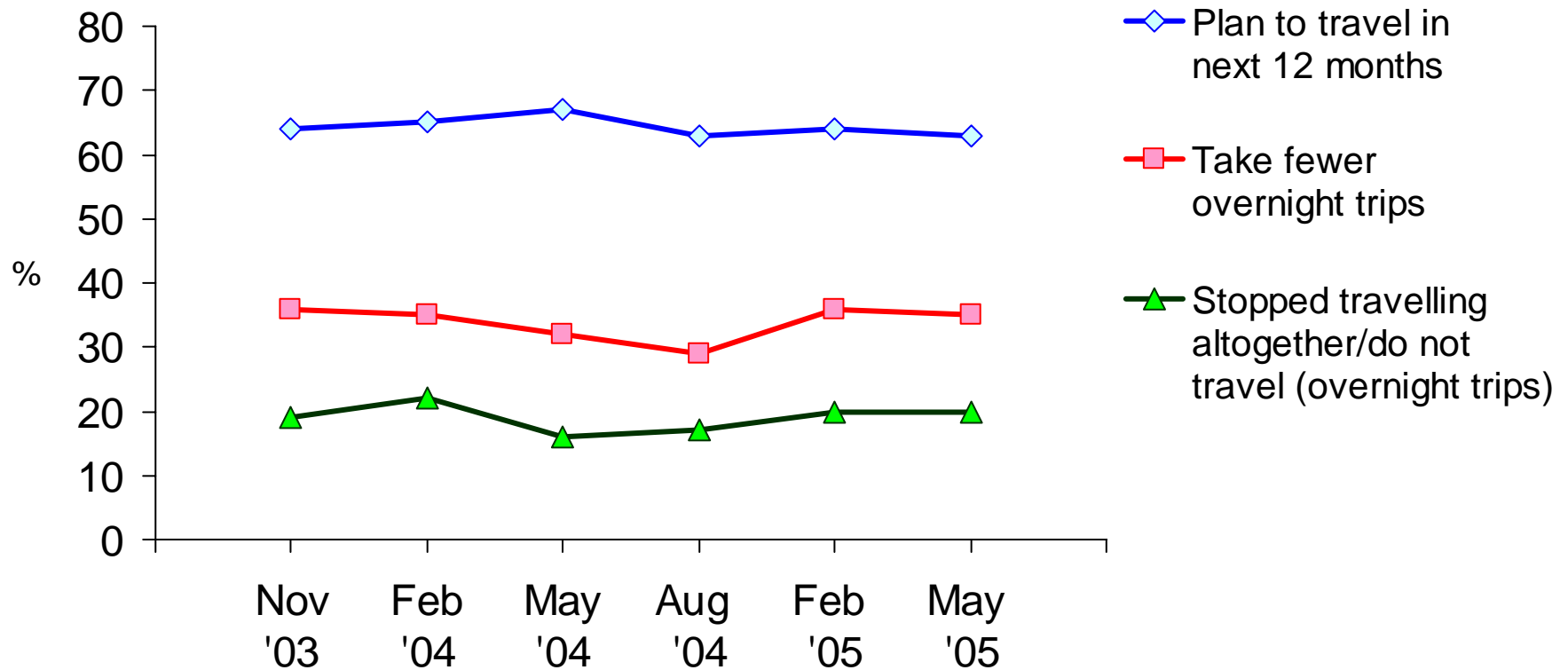


\* Have taken an overnight trip in the past two years or will take one in the next 12 months.

Q. How, if at all, have your travel plans changed over the past two years? Are you inclined to... ?

# Trend in general travel intentions and propensity to travel

Percent of **Canadians**

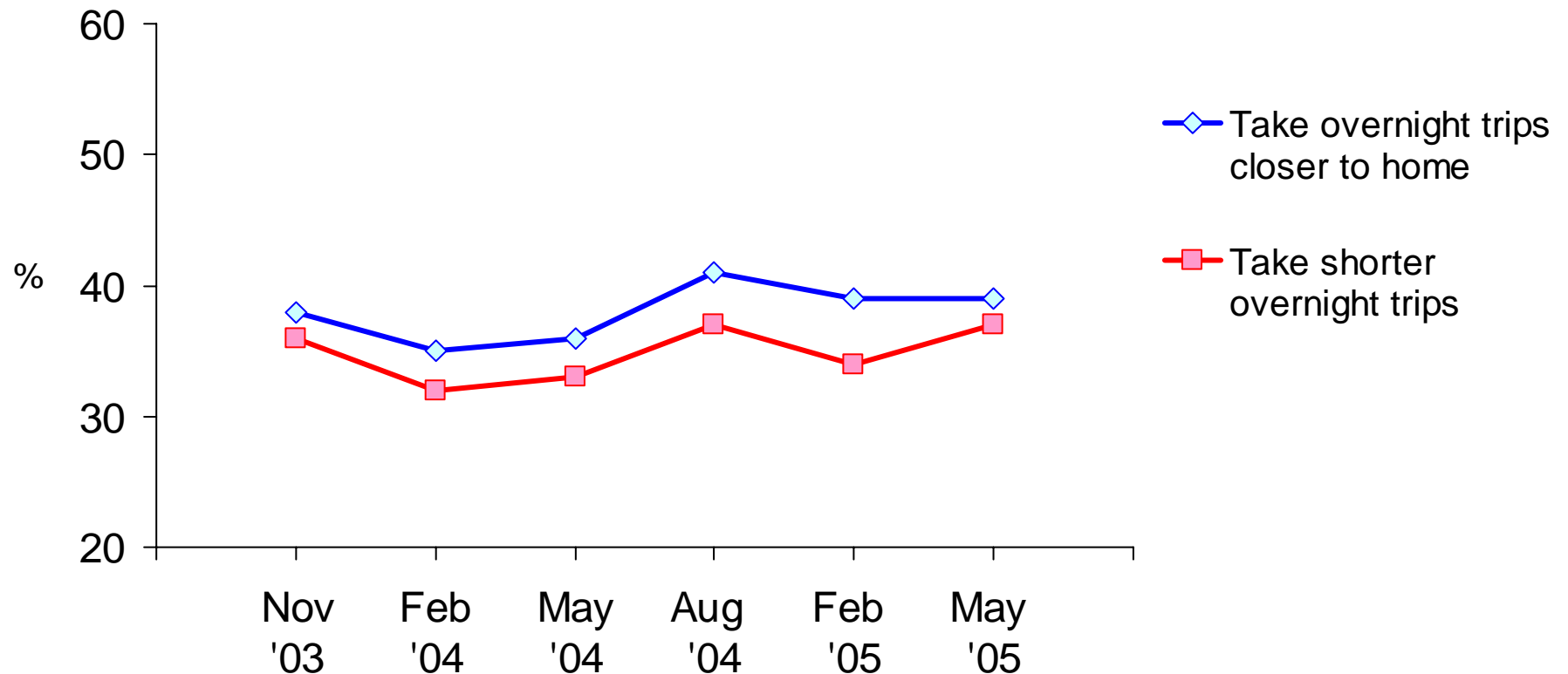


Q. Are you considering taking an out-of-town trip of one or more nights away from home in the next 12 months?

Q. How, if at all, have your travel plans changed over the past two years? Are you inclined to... ?

# Trend in duration and distance of overnight trips

Percent of **Canadian** travellers\*

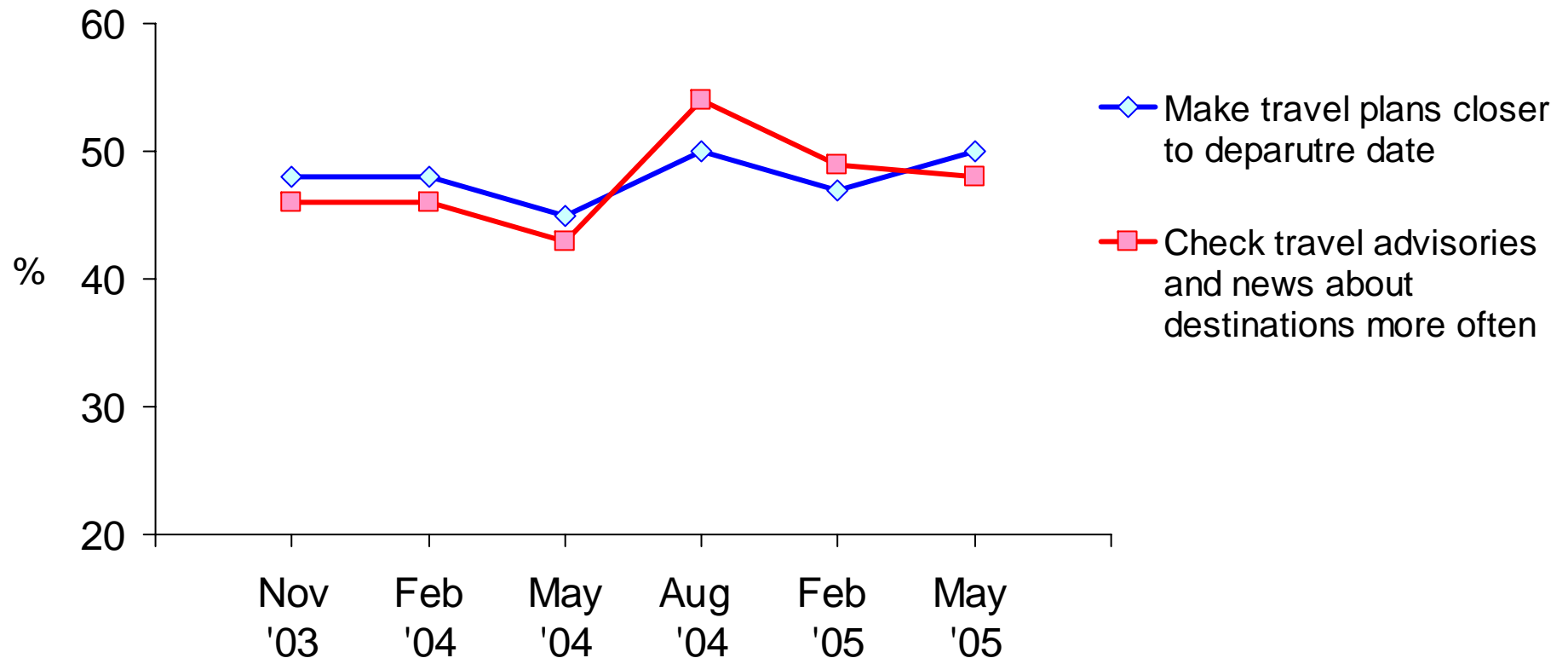


\* Have taken an overnight trip in the past two years or will take one in the next 12 months.

Q. How, if at all, have your travel plans changed over the past two years? Are you inclined to... ?

# Trend in overnight trip planning

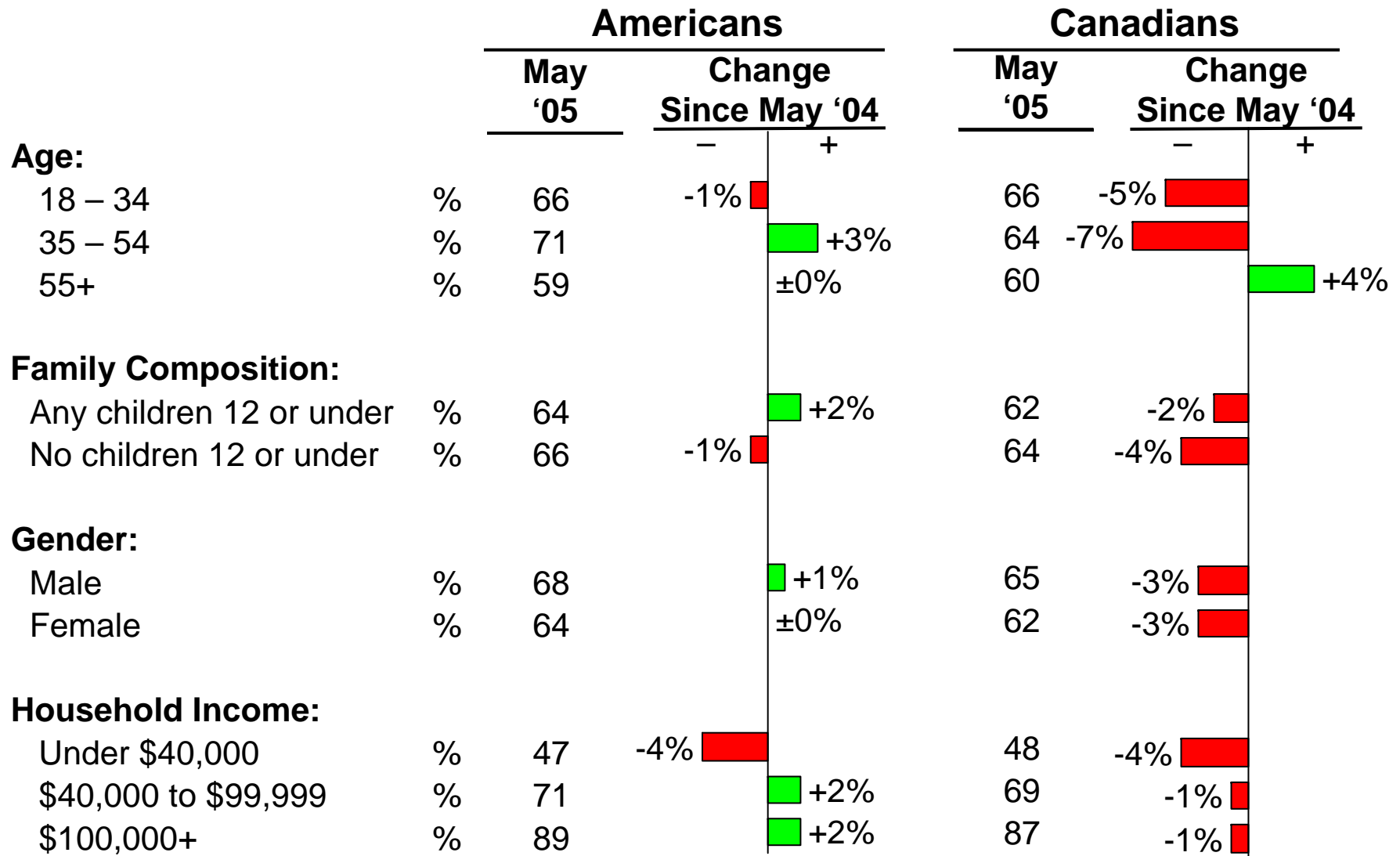
Percent of **Canadian** travellers\*



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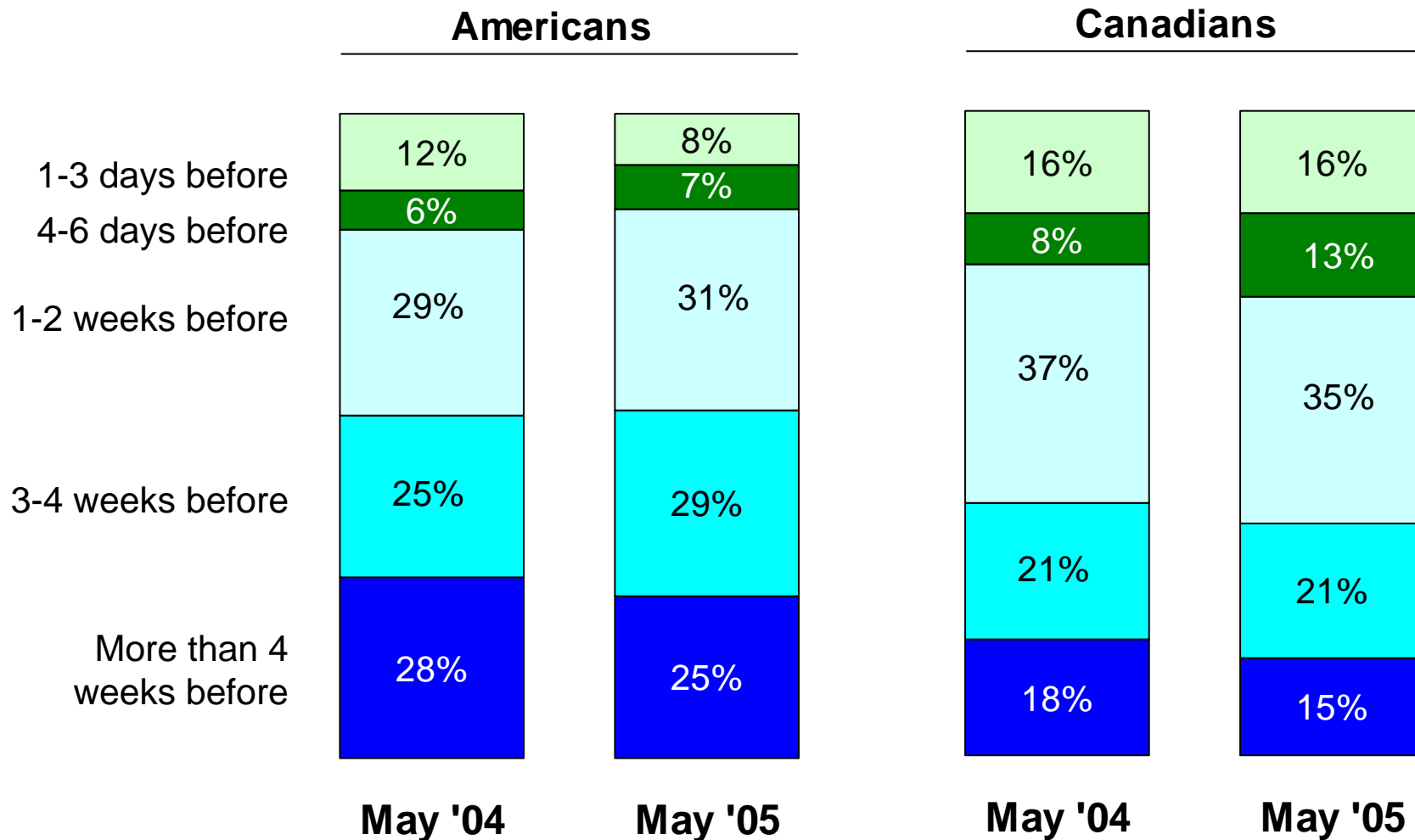
Q. How, if at all, have your travel plans changed over the past two years? Are you inclined to... ?

# Variations In Travel Propensity (Overnight Trip In Next 12 Months) By Demographics



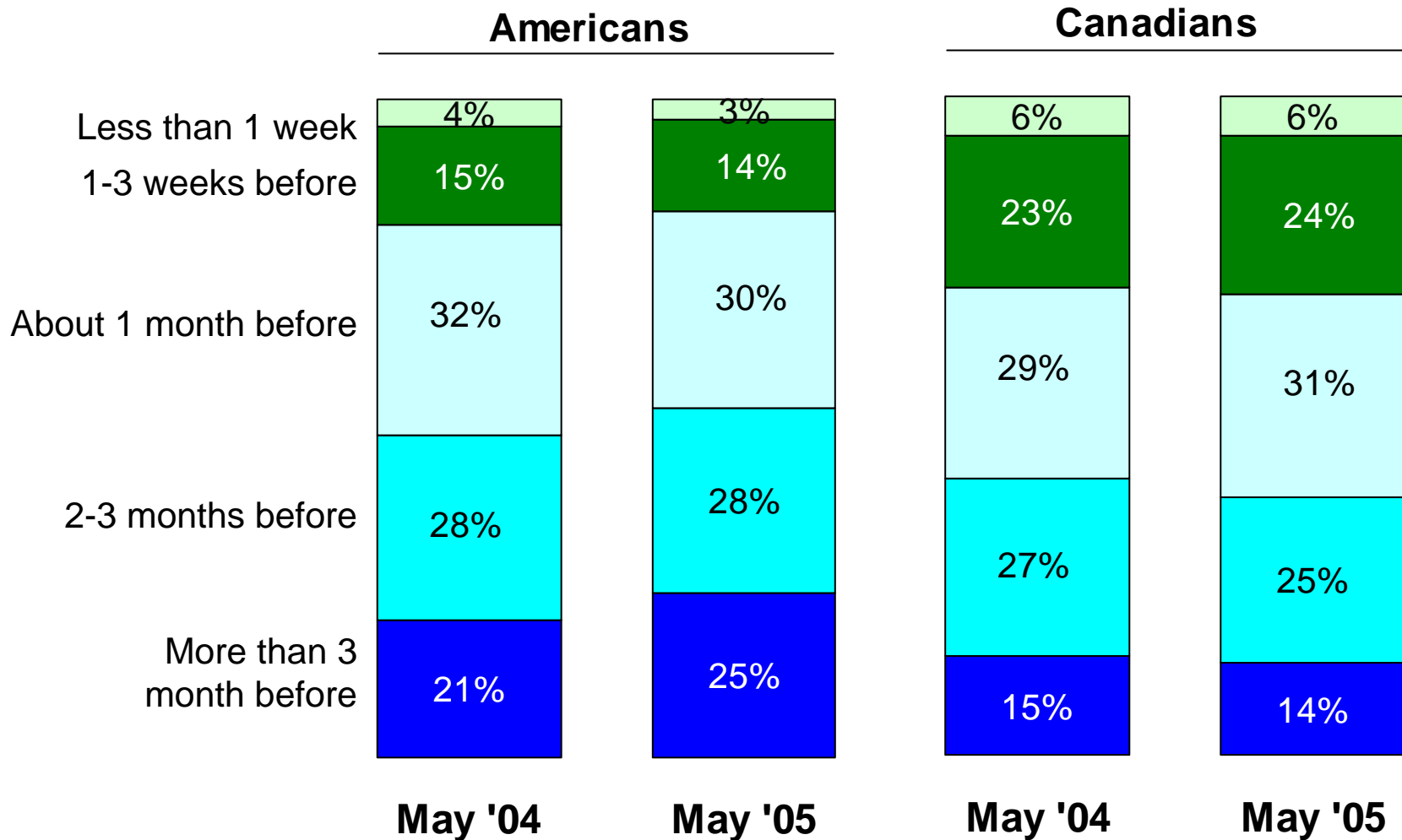
# Planning cycle for overnight trips of short duration — 1 to 3 nights

Percent of those who have booked short trips



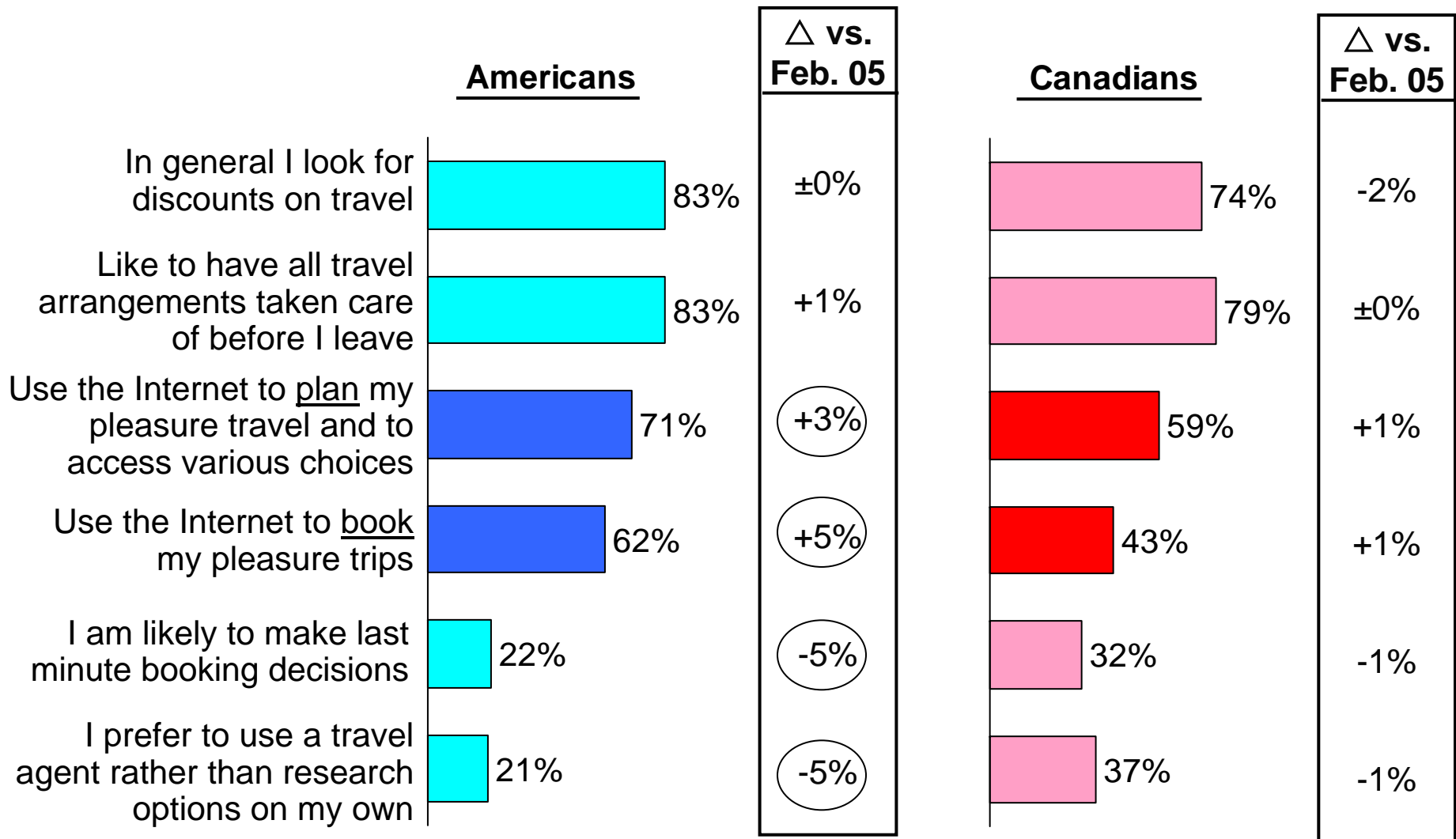
# Planning cycle for overnight trips of long duration — 4 nights+

Percent of those who have booked long trips



# Various aspects considered in planning process for pleasure travel

Percent of travellers — May '05

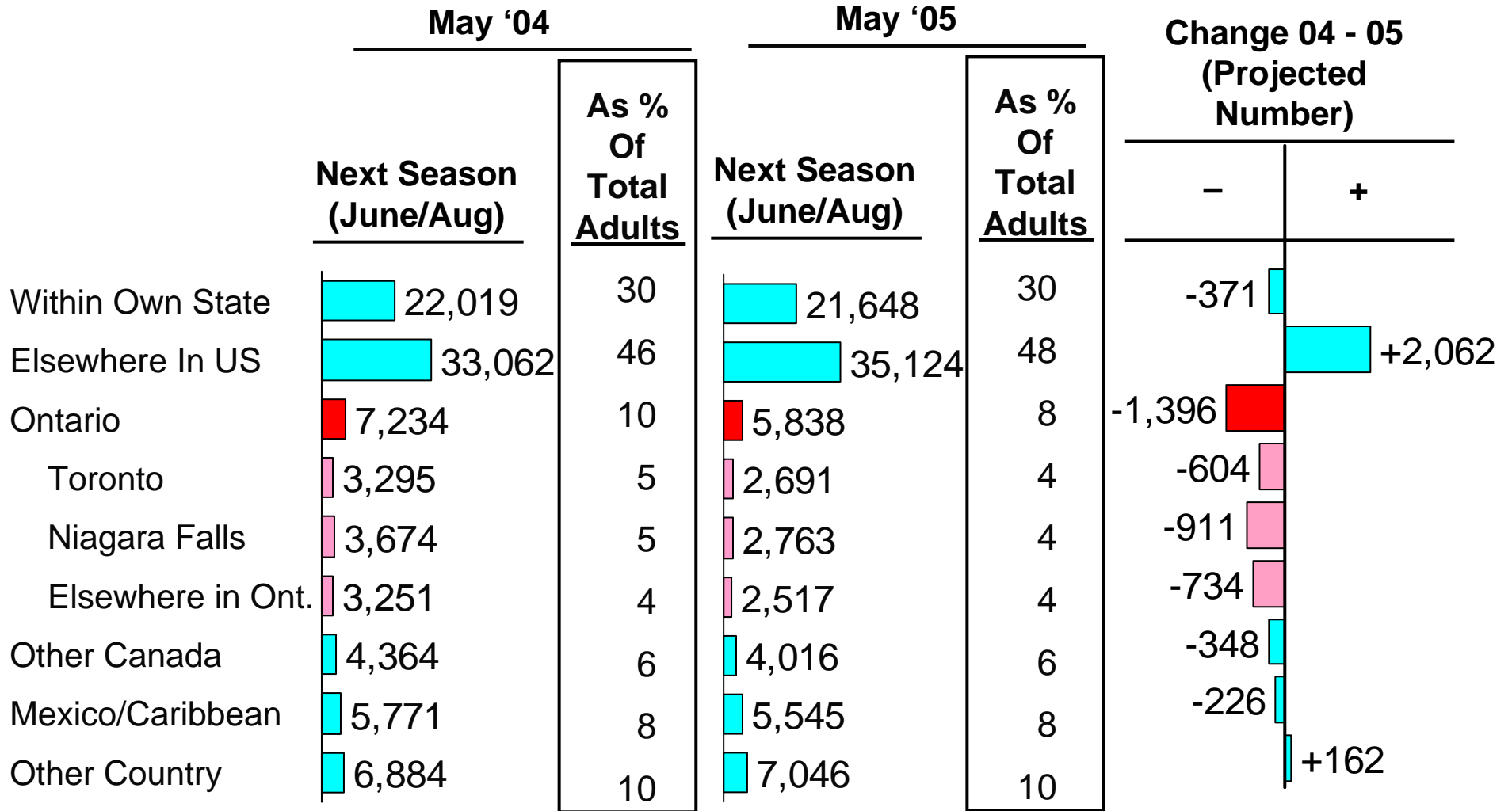


$\circ$  Statistically significant at 95% level of confidence.

# Travel Intention Details

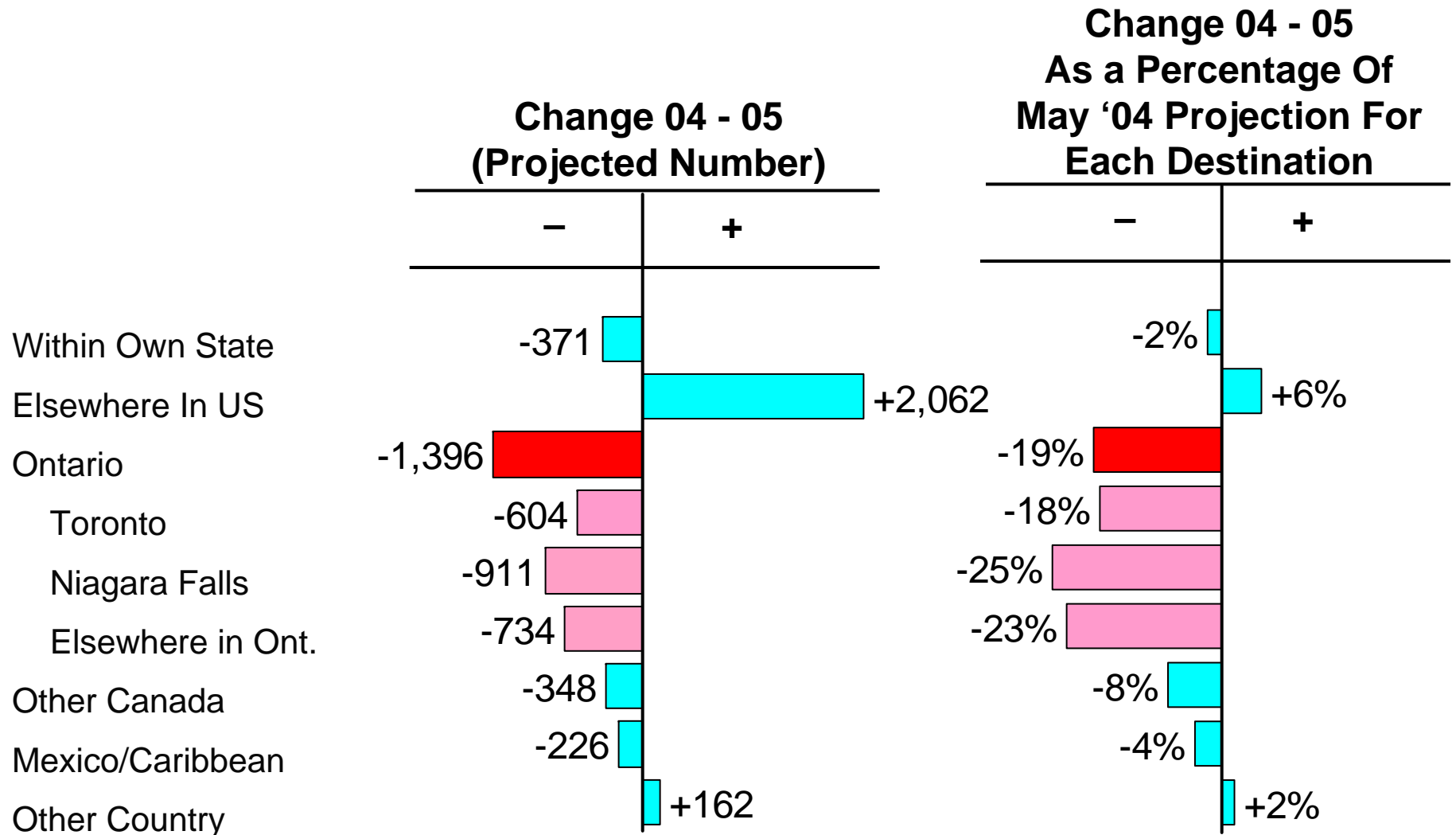
# Intended Travel Patterns Of US Residents — Next Season

Number of adults claiming overnight trip (thousands)



# Relative Shift In Travel Intent Among US Residents — **Next Season**

Change in number of adults claiming overnight trip (thousands)



# Ontario Travel Intention Incidence By Specific US Market

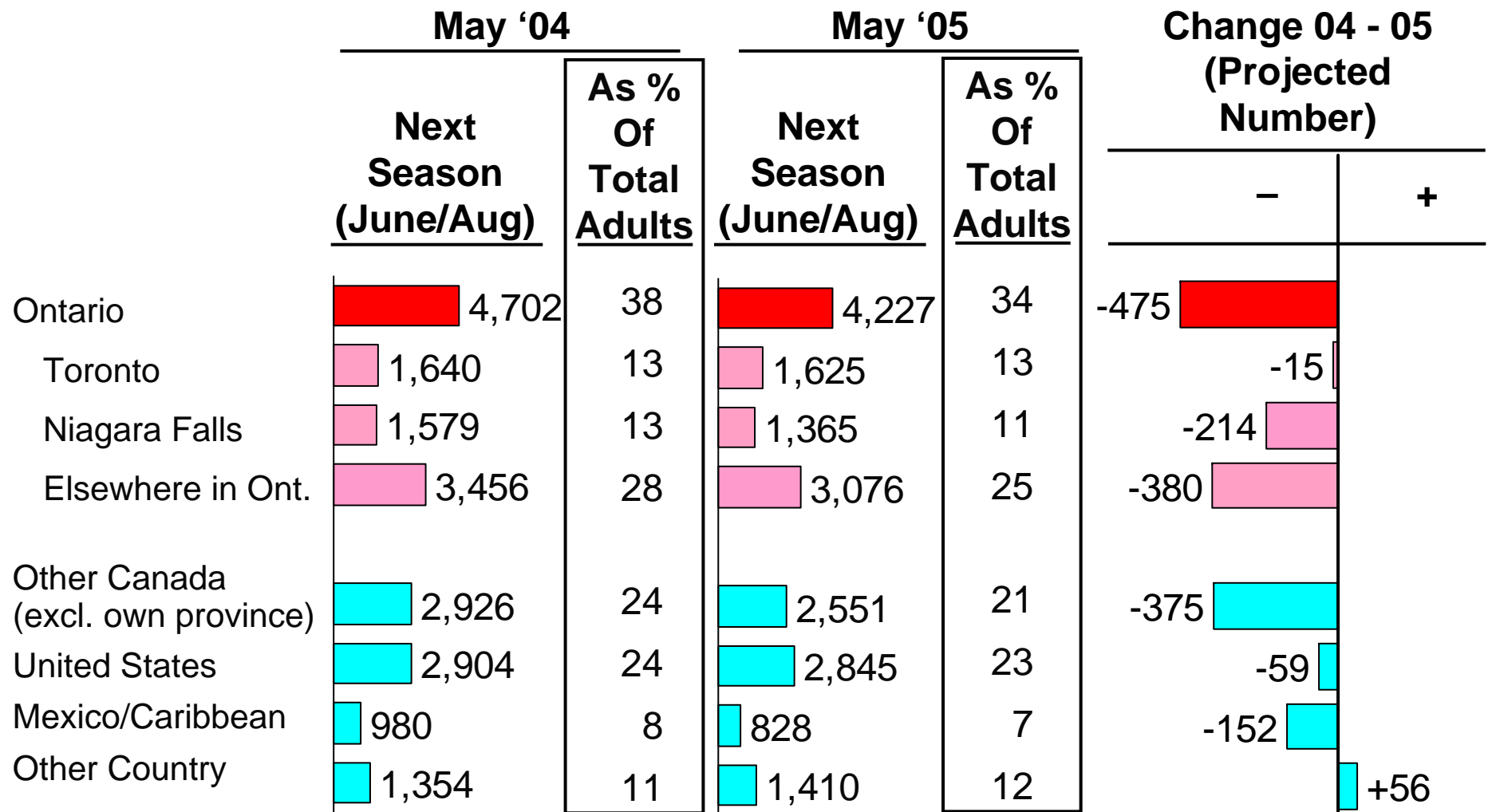
Percent Of Adults In Each Case Stating...  
Intend To Travel To Ontario

		As Of May '04		As Of May '05		June/Aug Projection Change 04 To 05	Sept/Nov Projection Change 04 To 05
		During June/Aug	During Sept/Nov	During June/Aug	During Sept/Nov		
Buffalo	%	35	23	31	14	-4	(-9)
Rochester	%	36	22	28	11	(-8)	(-11)
Syracuse	%	22	16	24	6	+2	(-10)
New York City	%	12	10	7	4	-5	(-6)
Pittsburgh	%	9	13	19	5	-4	(-8)
Detroit	%	23	18	14	10	-4	(-8)
Cleveland	%	18	3	14	9	+5	(+6)
Boston	%	6	4	6	2	±0	-2
Washington DC	%	6	6	11	5	+5	-1
Cincinnati	%	7	3	7	4	±0	+1
Milwaukee	%	3	4	9	2	(+6)	-2
Indianapolis	%	4	2	4	-	±0	-2
Chicago	%	6	11	10	2	+4	(-9)
Philadelphia	%	11	5	7	2	-4	-3
Minneapolis	%	5	2	9	4	+4	+2
<b>TOTAL US</b>	<b>%</b>	<b>10</b>	<b>8</b>	<b>8</b>	<b>4</b>	<b>-2</b>	<b>(-4)</b>

○ Statistically significant at 95% level of confidence.

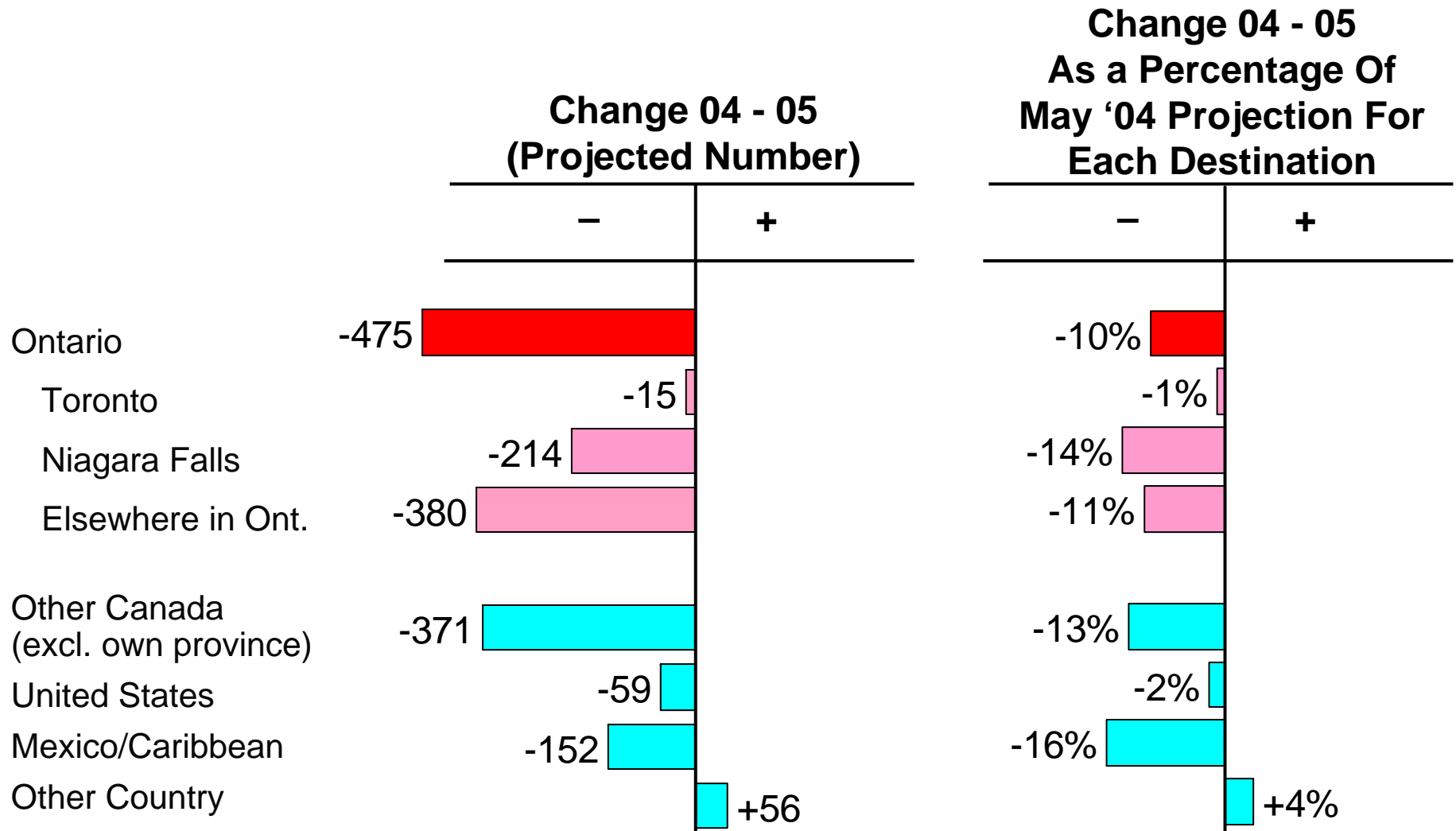
# Intended Travel Patterns Of Canadian Residents — Next Season

Number of adults claiming overnight trip (thousands)



# Relative Shift In Travel Intent Among Canadians — **Next Season**

Change in number of adults claiming overnight trip (thousands)



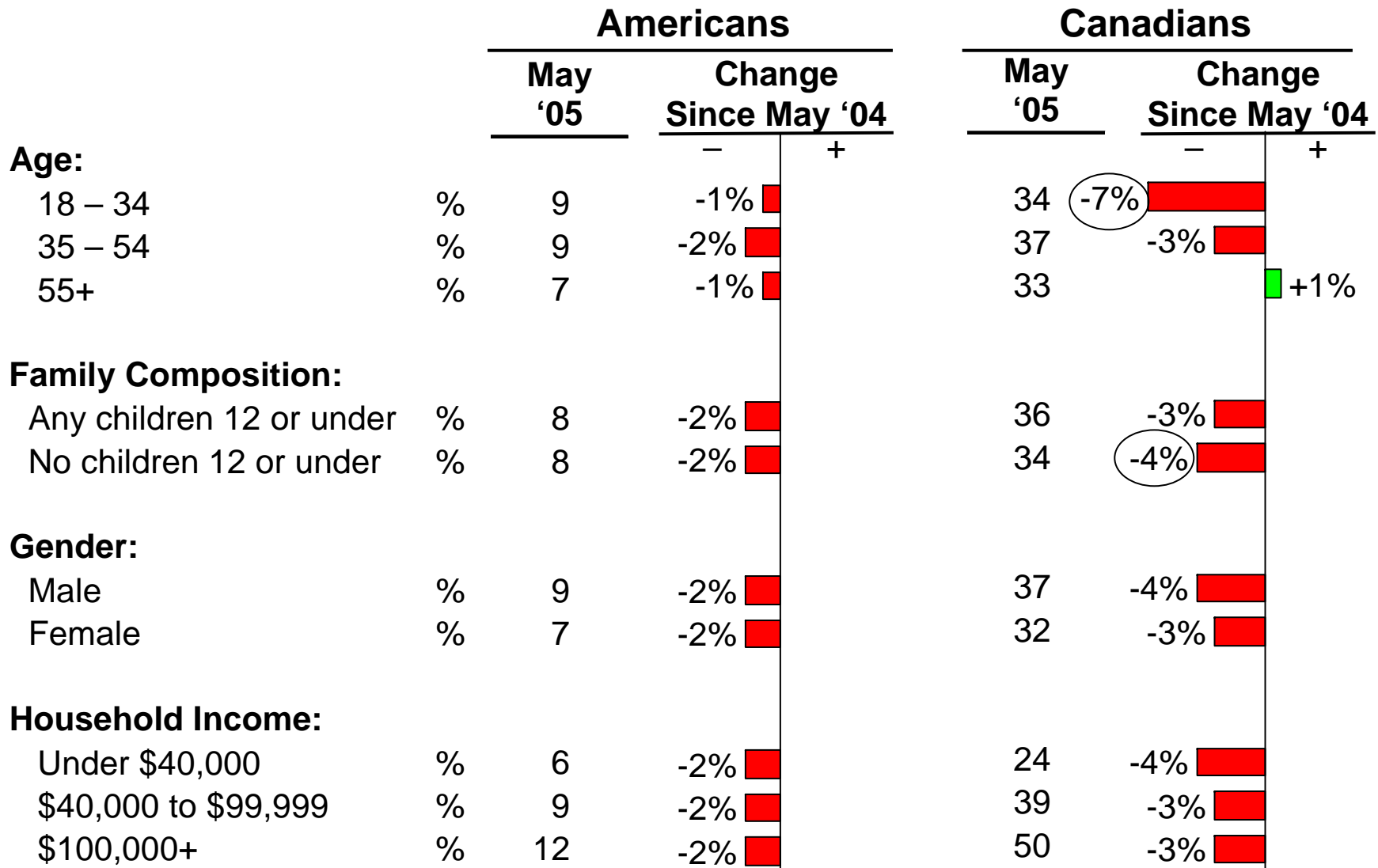
# Ontario Travel Intention Incidence By Specific Canadian Market

Percent Of Adults In Each Case Stating...  
Intend To Travel To/Within Ontario

	As Of May '04		As Of May '05		June/Aug Projection Change 04 To 05	Sept/Nov Projection Change 04 To 05
	During June/Aug	During Sept/Nov	During June/Aug	During Sept/Nov		
Quebec City	12	5	16	6	+4	+1
Montreal	22	16	27	11	+5	-5
Ottawa	46	35	46	28	±0	-7
Toronto	36	26	28	19	-8	-7
Other Ontario	46	29	42	24	-4	-5
Winnipeg	29	19	19	8	-10	-11
<b>TOTAL CANADA %</b>	<b>38</b>	<b>24</b>	<b>34</b>	<b>18</b>	<b>-4</b>	<b>-6</b>

\* Excluding trips within GTA among GTA residents.

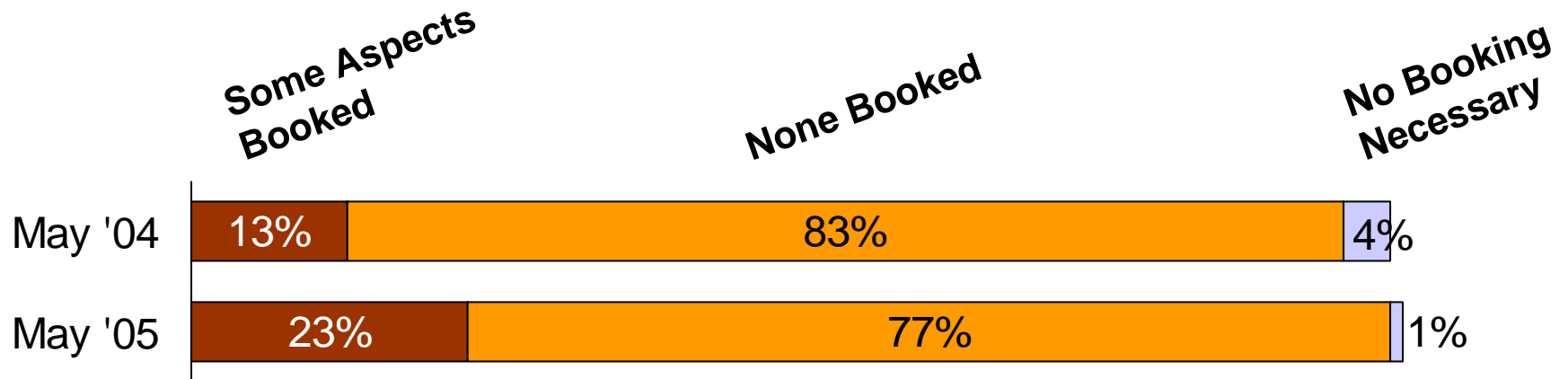
# Variations In Ontario Travel Intentions (Next Season) By Demographics



○ Statistically significant at 95% level of confidence.

# Whether any aspect of next Ontario pleasure trip is booked

Percent of **Americans** who plan to take overnight pleasure trip to Ontario in June/Aug



Percent of **Canadians** who plan to take overnight pleasure trip to Ontario in June/Aug



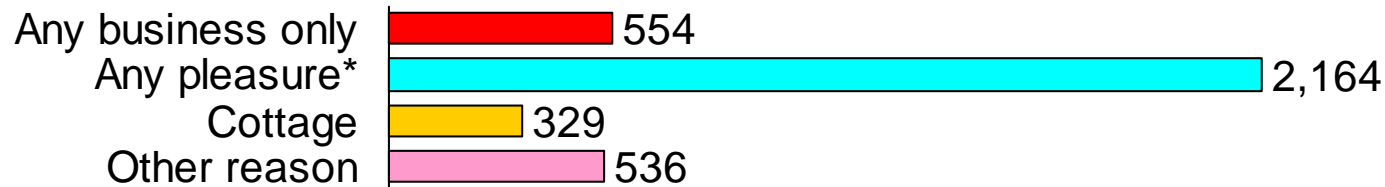
# Nature Of Upcoming Trips To/Within Ontario

# Main purpose of trips planned to Ontario In June/Aug — Americans

Projected number of **Americans** intending to travel to each destination as of May '05

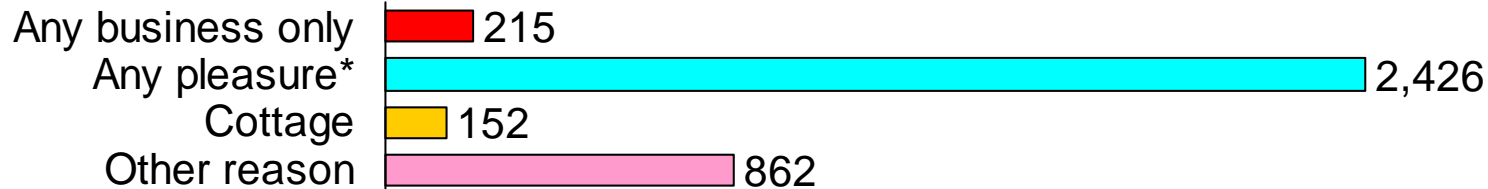
**Change From  
May '04  
%**

## To Toronto



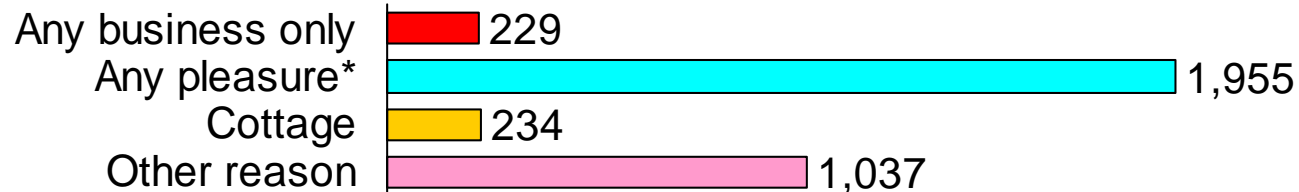
+35  
-531  
NA  
NA

## To Niagara Falls, Ontario



+82  
-853  
NA  
NA

## To Other Destinations In Ontario



-47  
-412  
NA  
NA

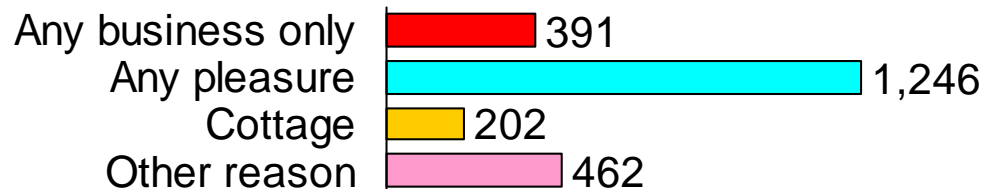
\* Excluding cottage/country home.

# Main purpose of trips planned to Ontario In June/Aug — Canadians

Projected number of **Canadians** intending to travel to each destination as of May '05

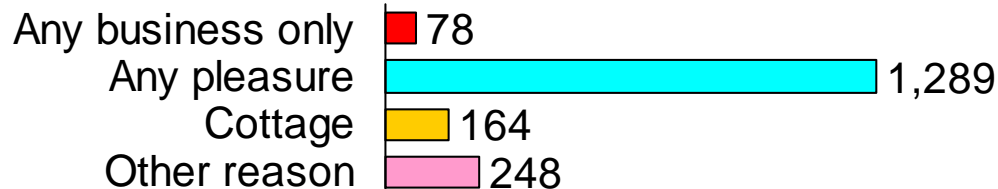
**Change From  
May '04  
%**

## To Toronto



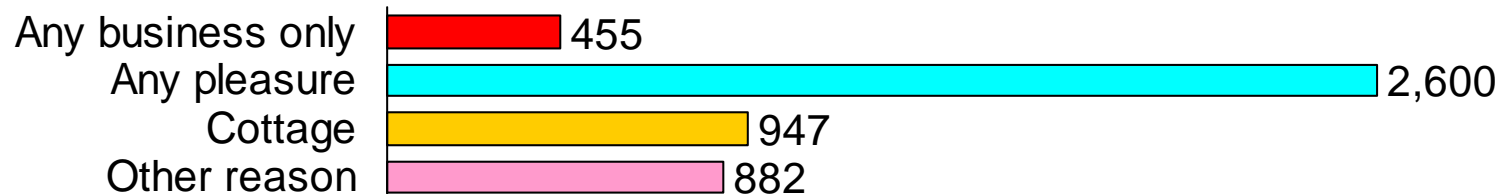
+121  
-141  
NA  
NA

## To Niagara Falls, Ontario



+15  
-102  
NA  
NA

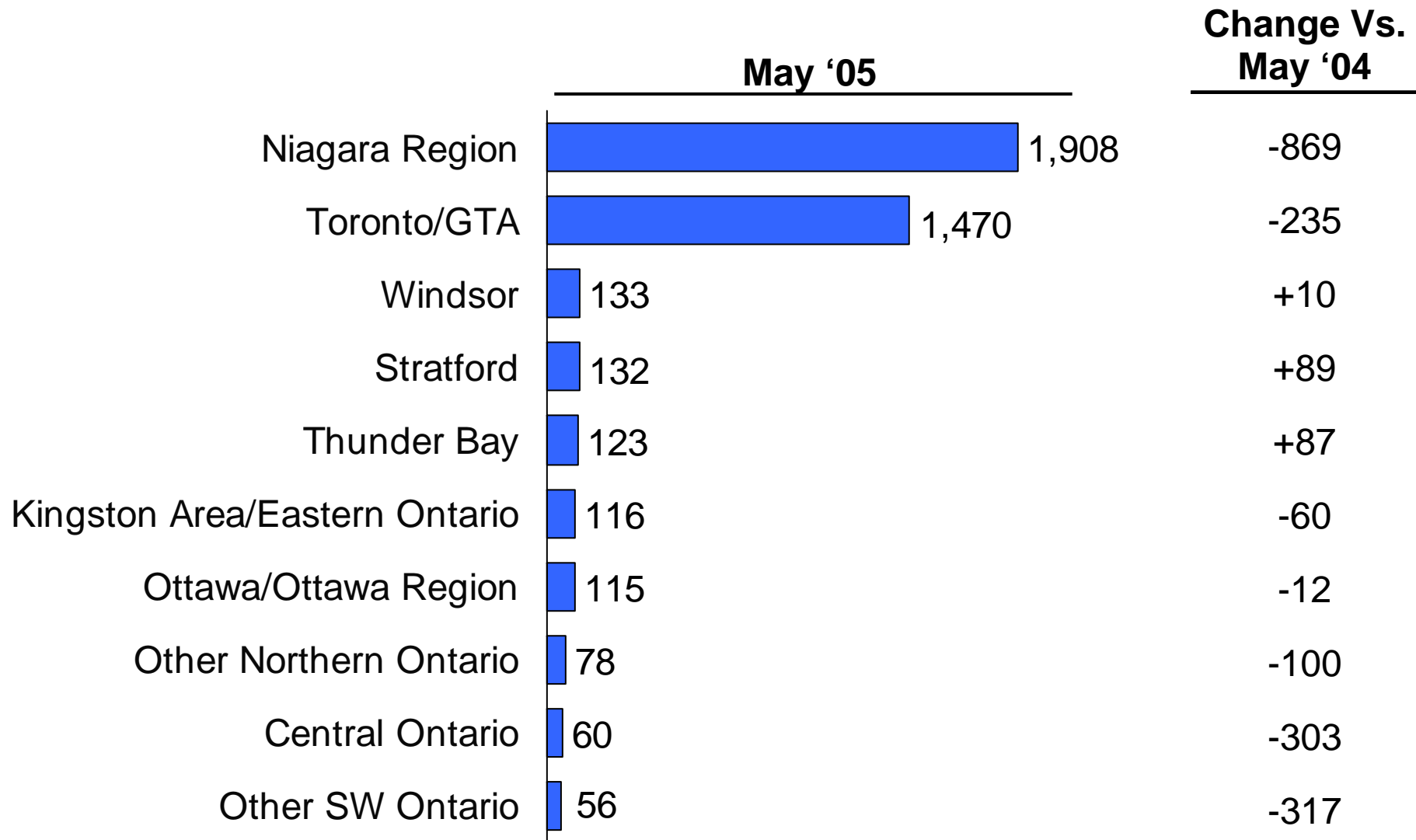
## To Other Destinations In Ontario



-59  
-129  
NA  
NA

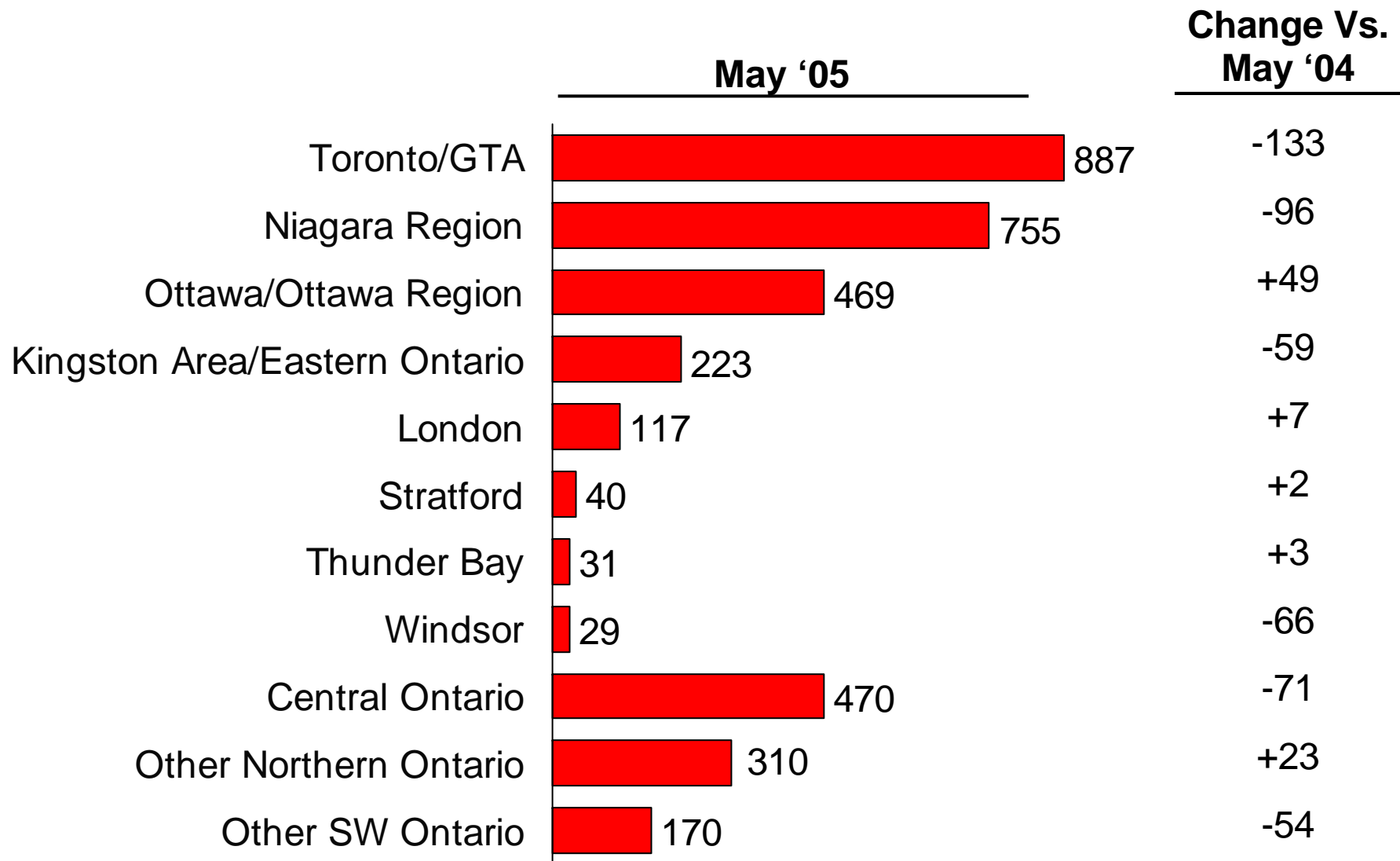
# Destination Of Next Overnight Pleasure Trip To/Within Ontario (June/Aug '05) — Americans

Number of Americans who intend to travel to each destination (thousands)

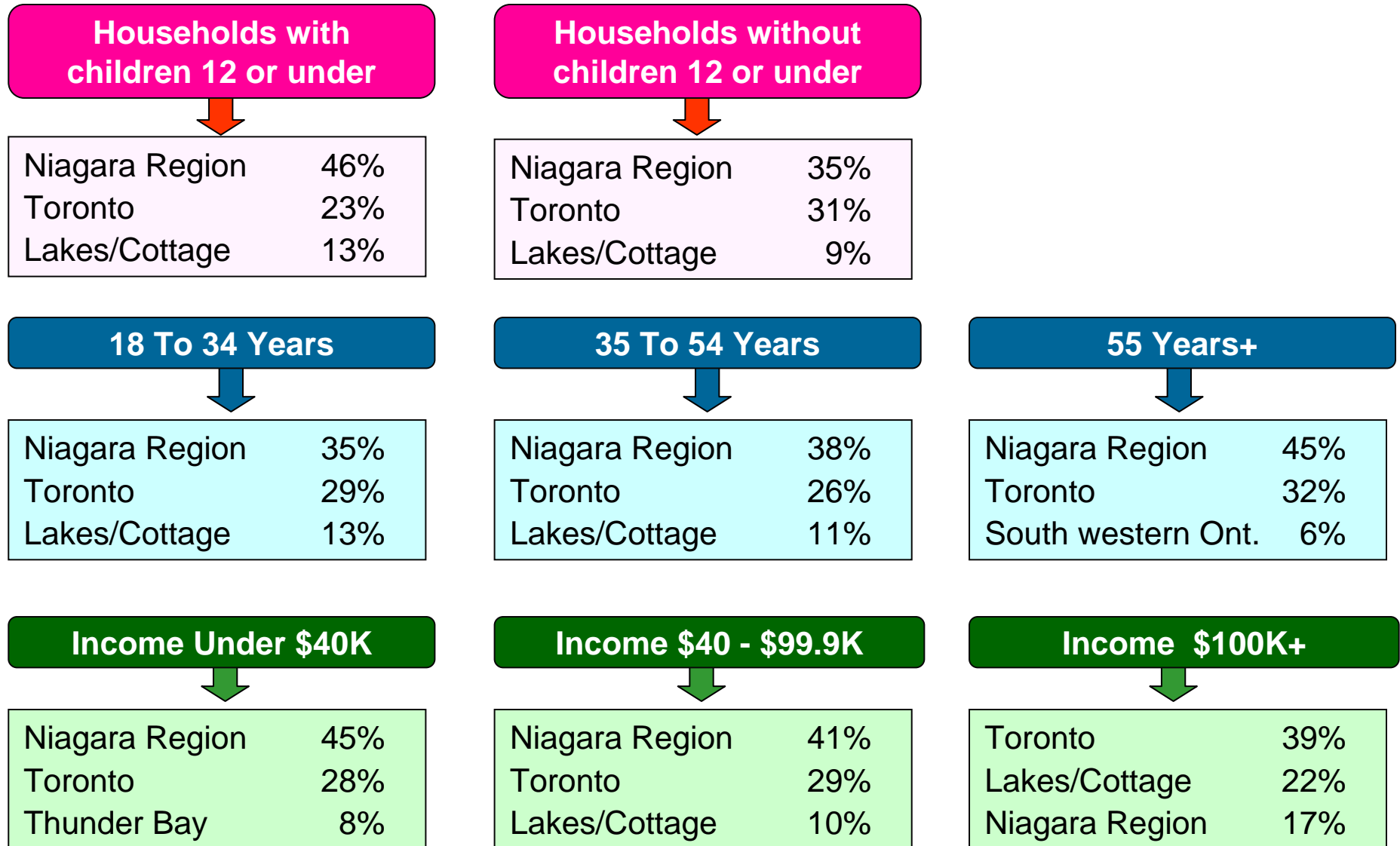


# Destination Of Next Overnight Pleasure Trip To/Within Ontario — Canadians

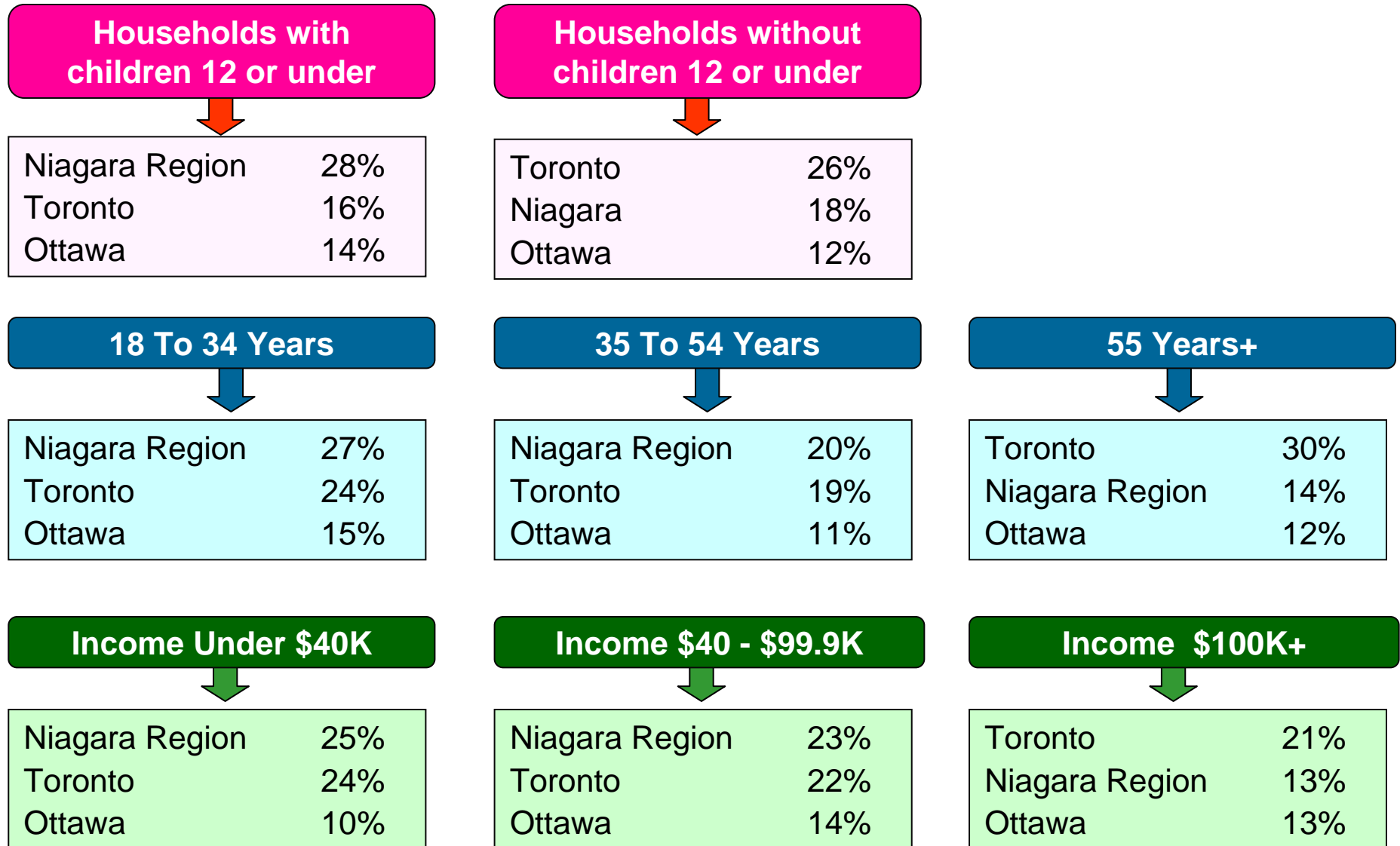
Number of Canadians who intend to travel to each destination (thousands)



# Top 3 Destinations For Next Pleasure Trip To Ontario By Demographics — % Of US Intended Visitors



# Top 3 Destinations For Next Ontario Pleasure Trip By Demographics — % Of Canadians Intended Visitors



# General Experience With And Interest In Ontario

# Latent Interest In Ontario Travel Among Americans (May '05)

Percent of US travellers

Plan to take overnight Ontario in next 6 months

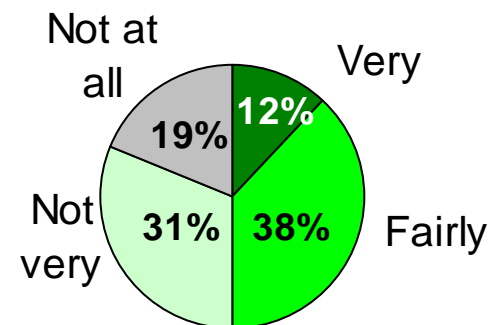
Not in next 6 months but have been to Ontario in past 2 years



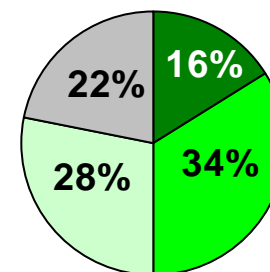
Not in next 6 months and haven't been there in past 2 years

= 44,514,000 travellers

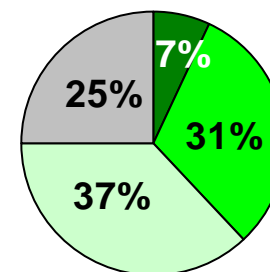
## Interest in visiting in next 2 years



Toronto



Niagara Falls



Other Ontario

# Regional Comparison in Latent Interest (May '05)

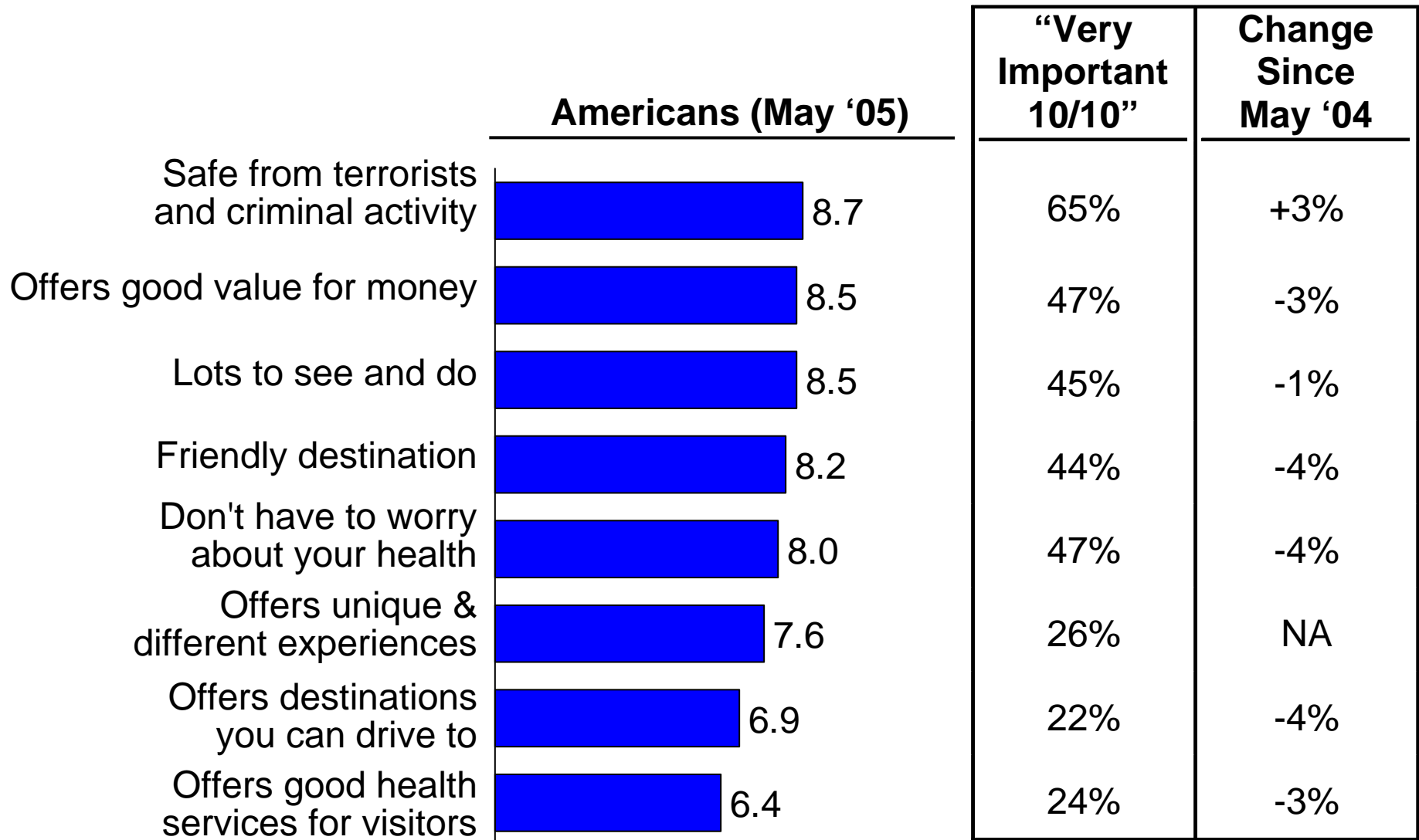
Percent stating "VERY INTERESTED" in taking overnight trip to/within Ontario among those not intending to travel there in next six months

		Percent Stating "Very Interested" In...		
		Toronto	Niagara Falls	Other Ontario
<b>Americans</b>	Near Market	15%	17%	9%
	Mid Market	11%	12%	7%
<b>Canadians</b>	Ontario	20%	20%	24%
	Montreal	11%	11%	10%
	Quebec City	11%	10%	10%
	Winnipeg	12%	14%	15%

# Travel Motivations & Barriers

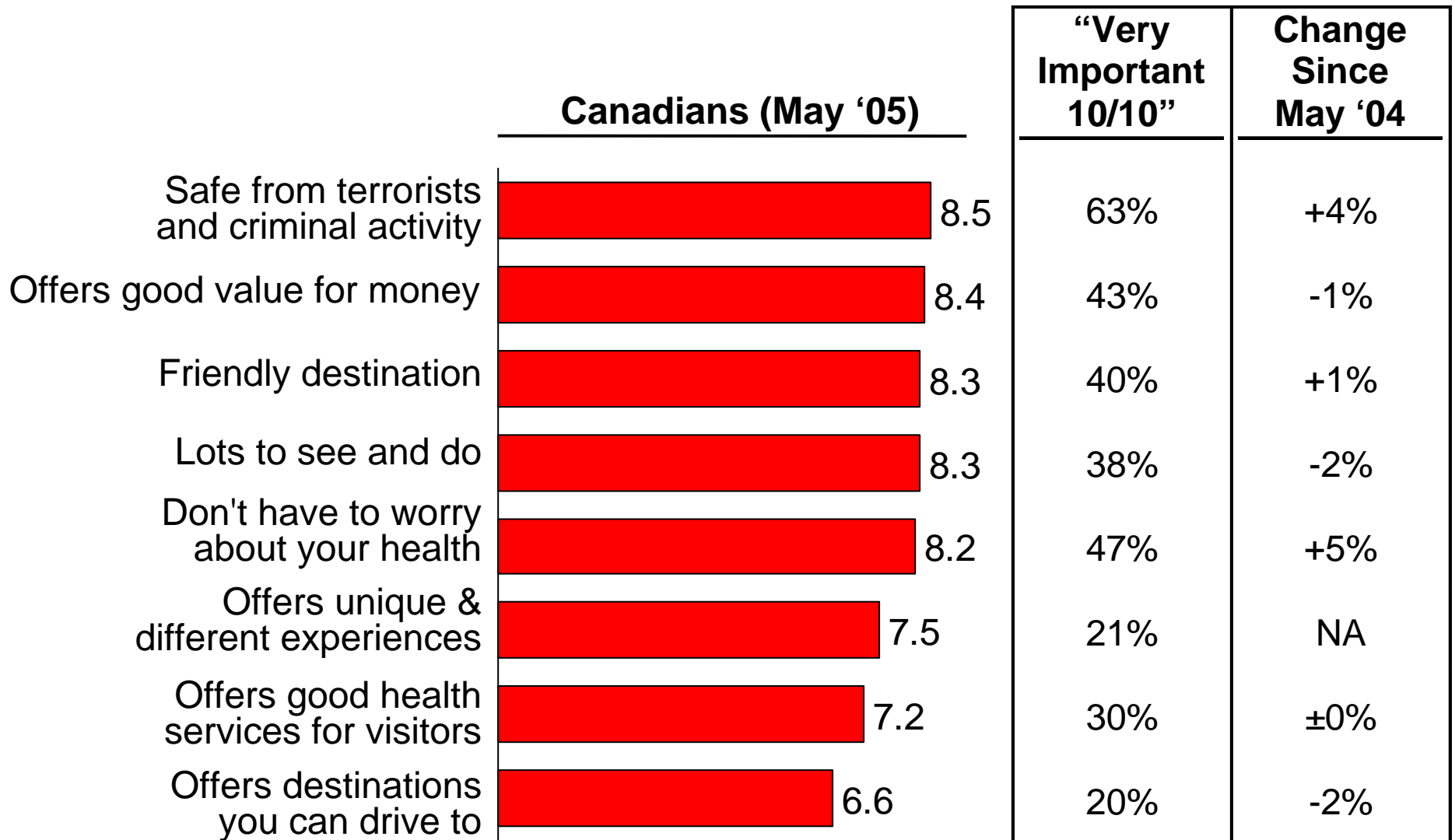
# Importance Of Various Factors In Selecting A Pleasure Travel Destination

Average score on 10-point scale among past 2 year/next 12-month American travellers



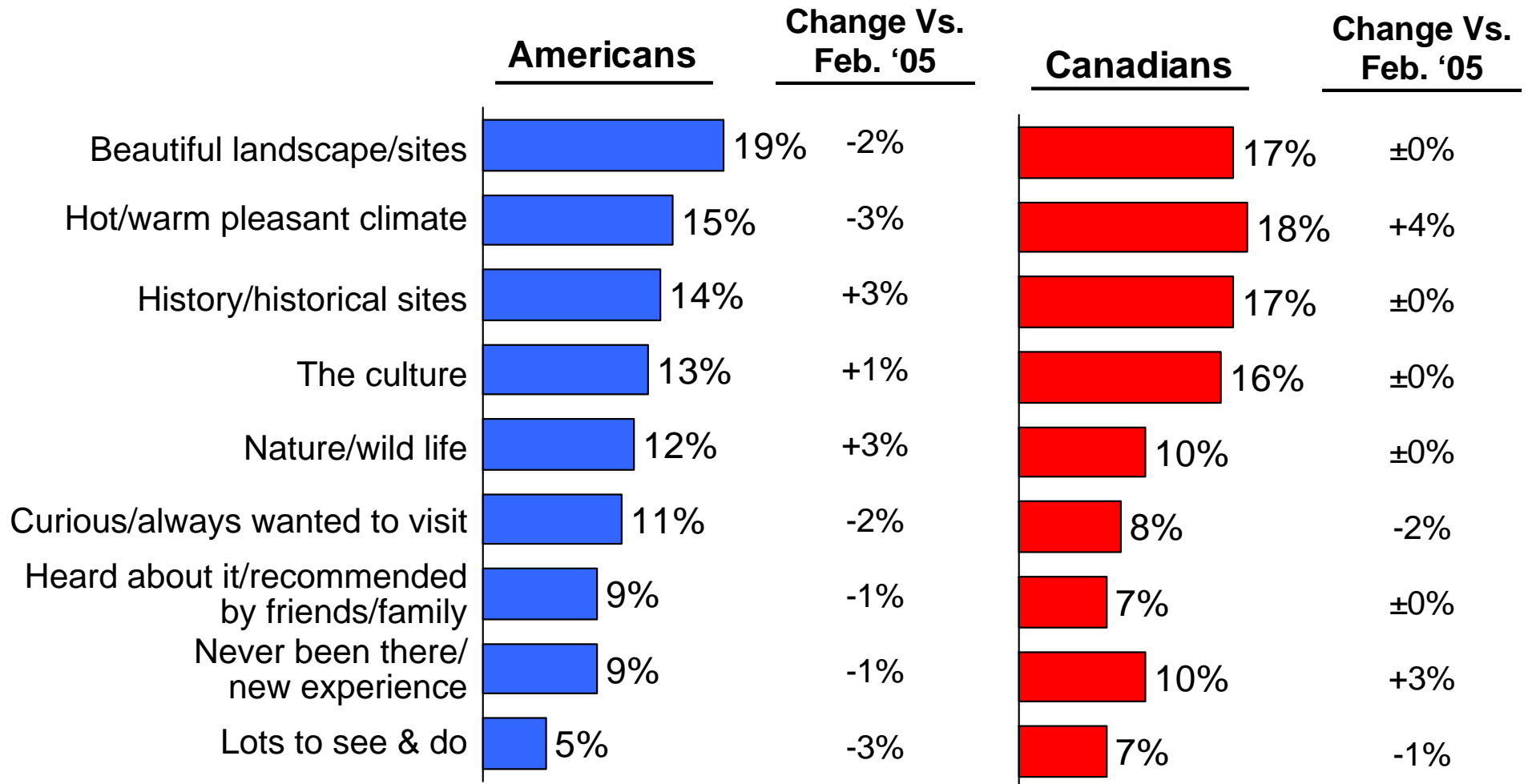
# Importance Of Various Factors In Selecting A Pleasure Travel Destination

Average score on 10-point scale among past 2 year/next 12-month Canadian travellers



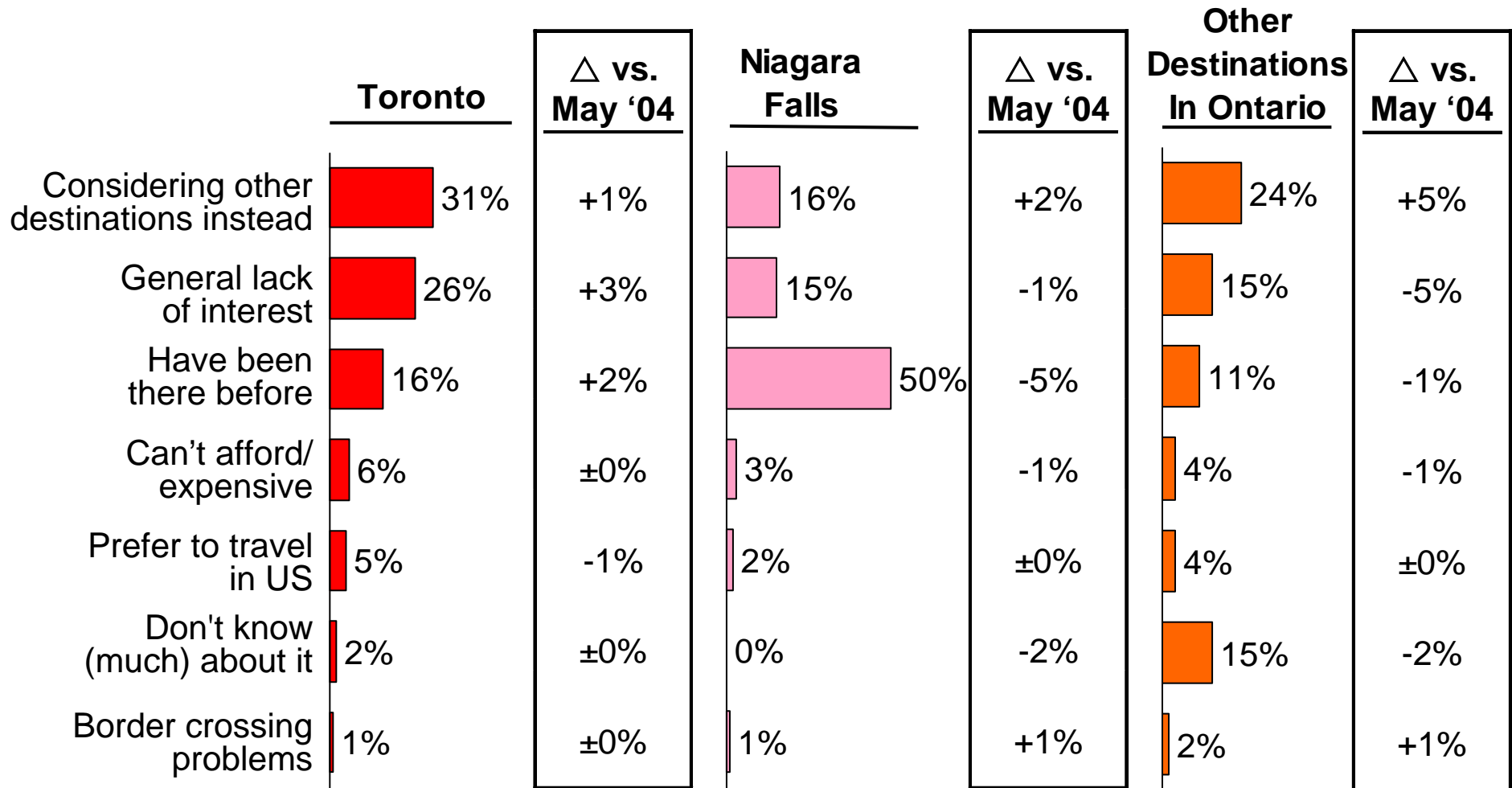
# What Makes Ideal Destination “Ideal” (May ‘05)

Percent of ... identifying ideal destination



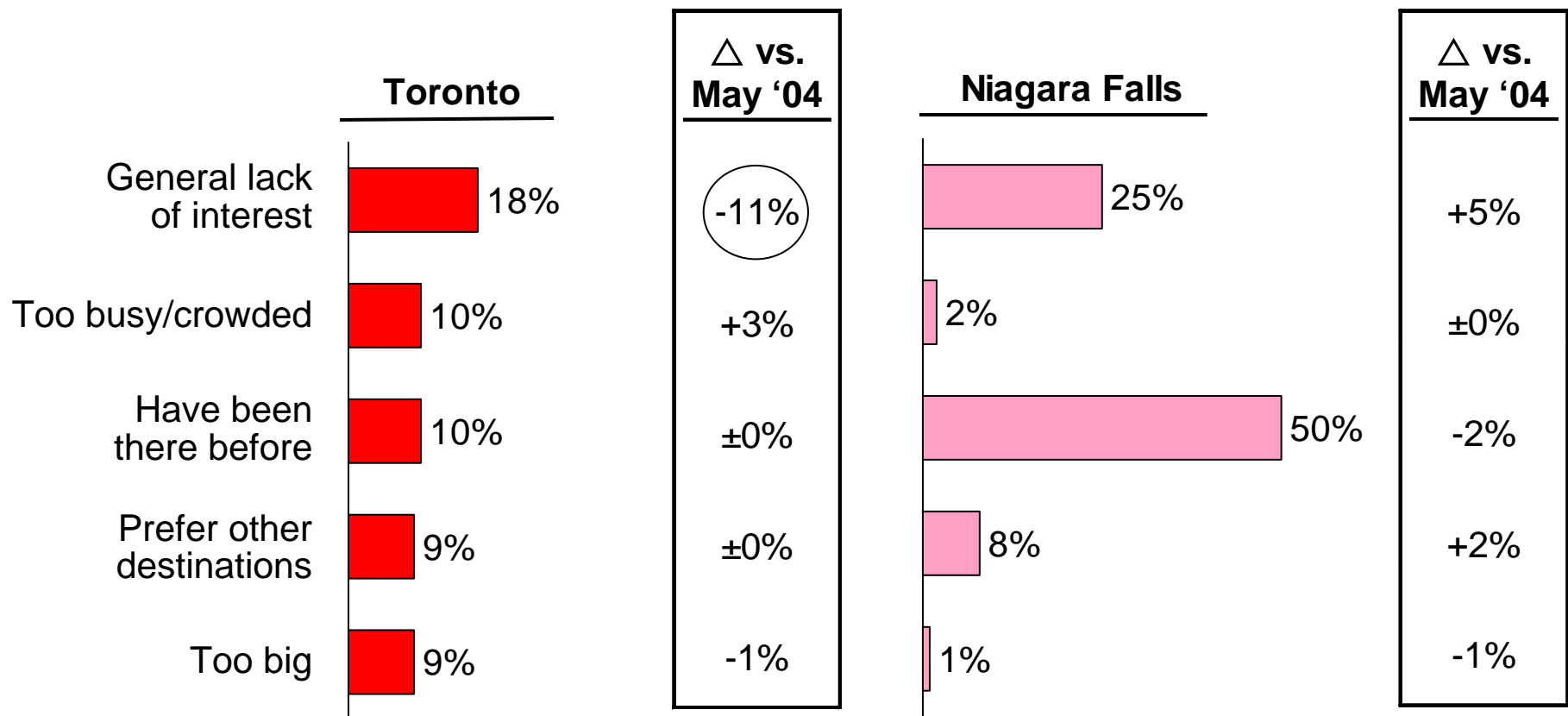
# Reasons for lack of interest in visiting specific Canadian destinations — Among Americans (May '05)

Percent of Americans who are “not very/not at all interested” in visiting each destination within the next 2 years and have visited Ontario in the past



# Reasons for lack of interest in visiting specific Canadian destinations — Among Canadians (May '05)

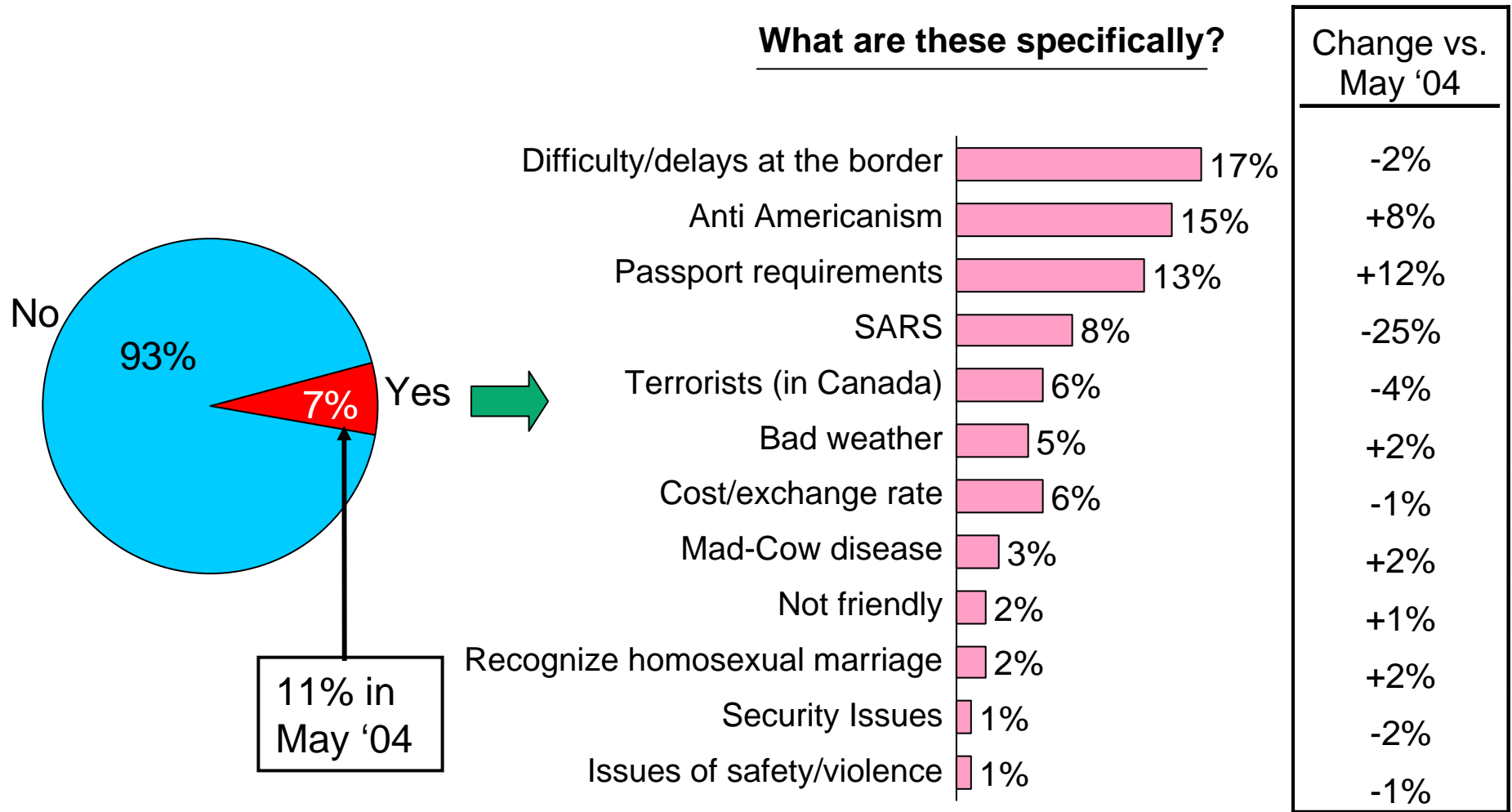
Percent of Canadians who are “not very/not at all interested” in visiting each destination within the next 2 years



# Impact Of Specific Negative Events

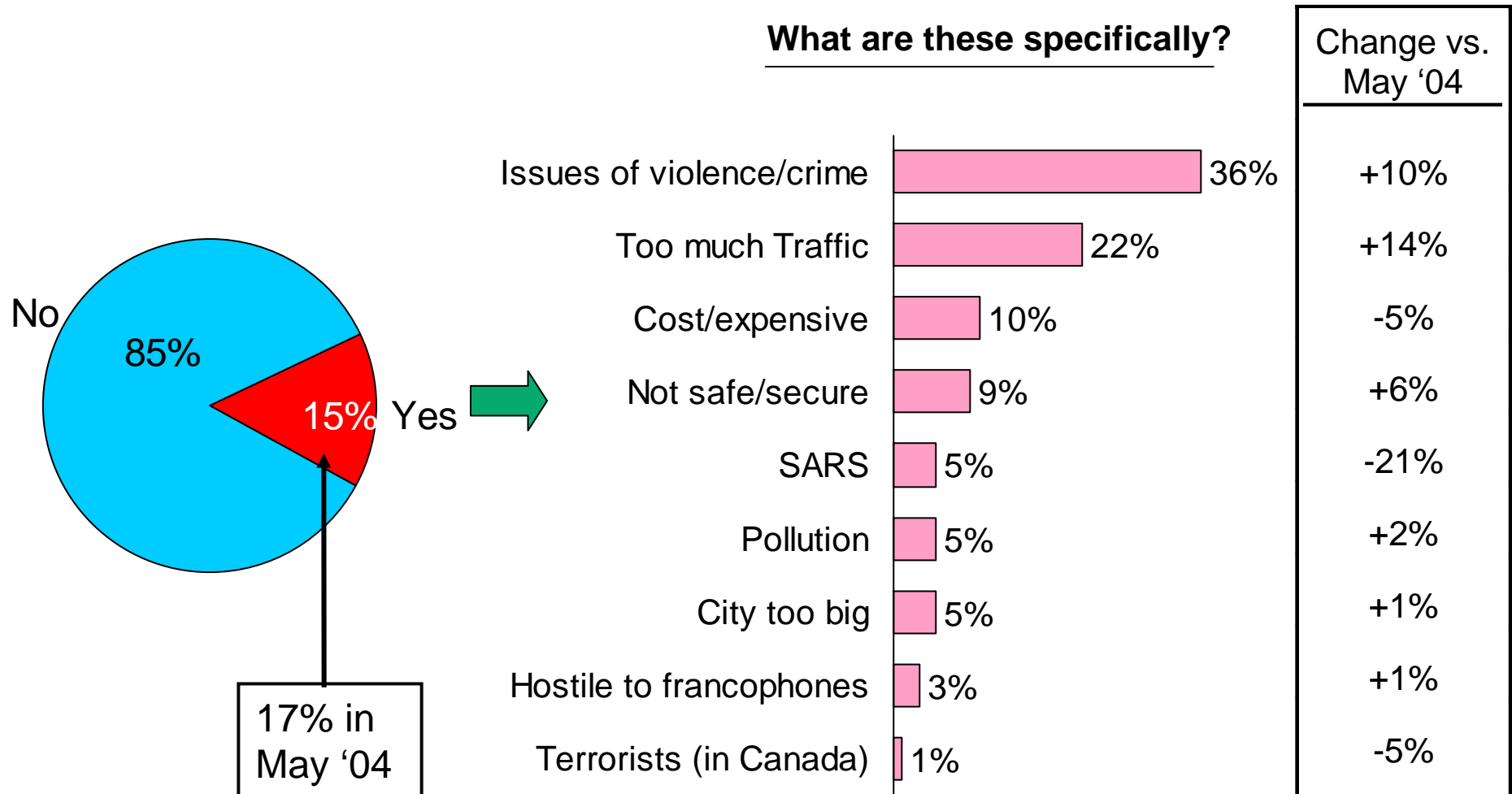
# Are there any specific events or issues that you have heard about that make you less inclined to travel to Toronto, Niagara Falls or other places in Ontario?

## Percent of **Americans** aware of Ontario



Are there any specific events or issues that you have heard about that make you less inclined to travel to Toronto, Niagara Falls or other places in Ontario?

Percent of **Canadians**



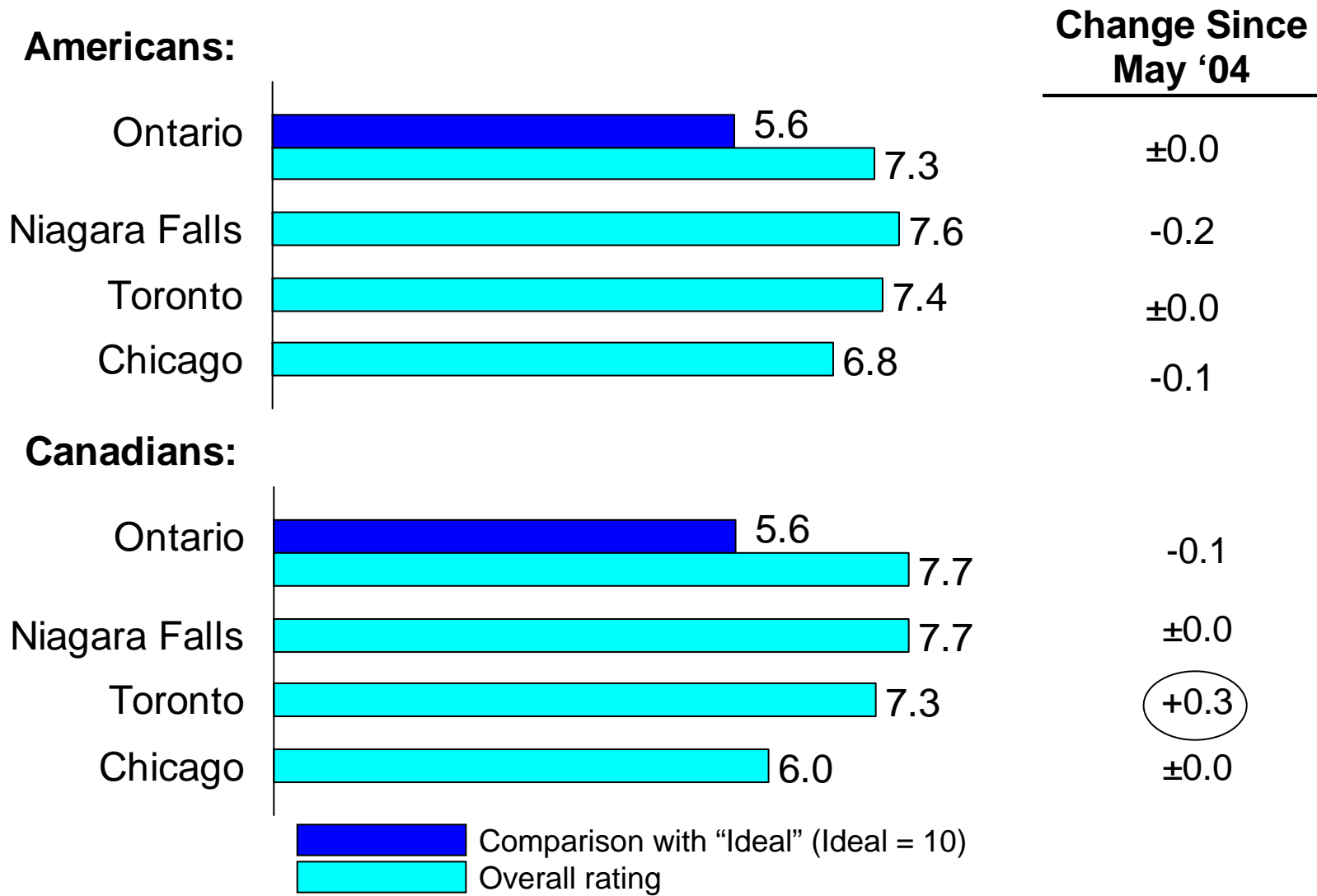
# Perceptions Of Ontario



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# Overall Rating Of Ontario As Pleasure Travel Destination & Comparison With Ideal (May '05)

Average rating on 10-point scale among travellers



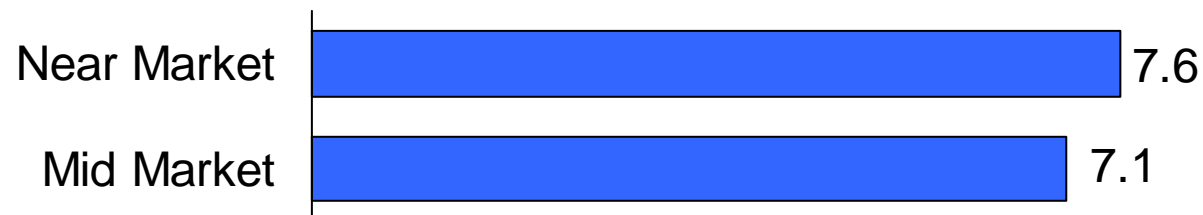
○ Statistically significant at 95% level of confidence.

# Overall Rating Of Ontario As Pleasure Travel Destination — Variation By Market (May '05)

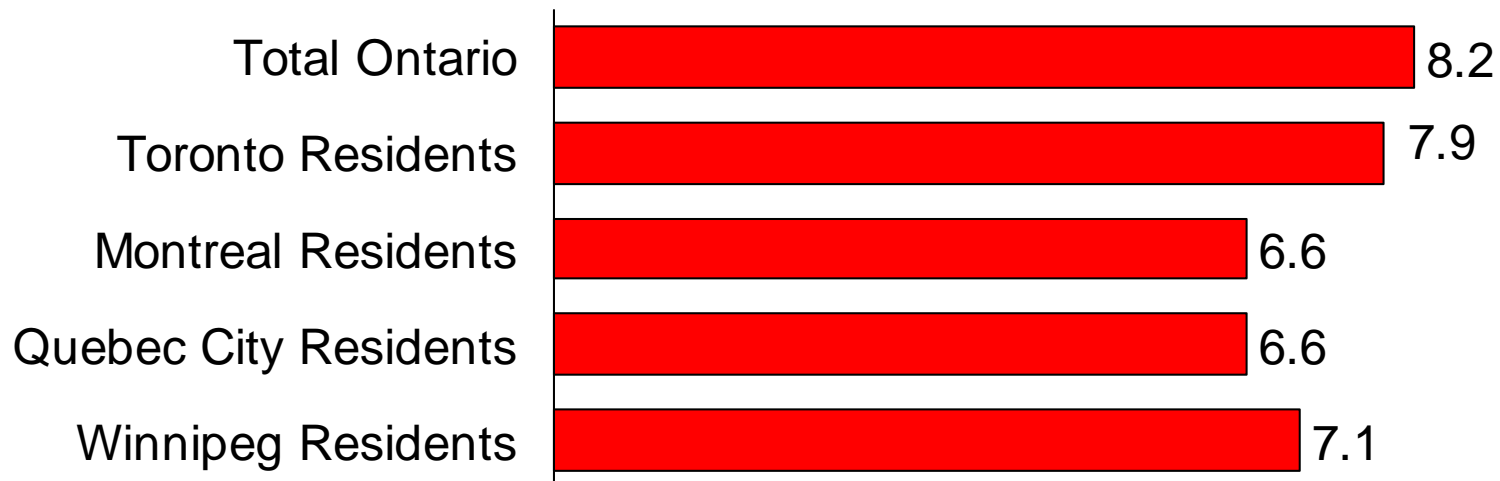
Average score on 10-point scale among travellers

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## Americans:



## Canadians:



# Ontario Imagery Ratings

Average on 10-point scale among American travellers

	Among Americans		Change Since May '04	
	May '04	May '05	-	+
<b>Attributes In Order Of Importance:</b>				
Safe from terrorists & criminals	8.0	8.2		+0.2
Good value for the money	7.4	7.2	-0.2	
Lots to see and do	7.8	7.9		+0.1
Friendly destination	8.1	7.9	-0.2	
Don't have to worry about your health	8.0	8.1		+0.1
Offers unique & different experiences	NA	7.3		NA
Offers destinations you can drive to	7.5	7.4	-0.1	
Good health services for visitors	7.3	7.1	-0.2	

# Ontario Imagery Ratings

Average on 10-point scale among Canadian travellers

	Among Canadians		Change Since May '04	
	May '04	May '05	-	+
<b>Attributes In Order Of Importance:</b>				
Safe from terrorists & criminals	8.4	8.5		+0.1
Good value for the money	7.4	7.4		±0.0
Friendly destination	7.9	8.1		+0.2
Don't have to worry about your health	8.4	8.6		+0.2
Lots to see and do	8.2	8.1	-0.1	
Offers unique & different experiences	NA	6.9		NA
Good health services for visitors	8.1	8.2		+0.1
Offers destinations you can drive to	8.5	8.5		±0.0

# Ontario Ratings For Trip Types

Average on 10-point scale among American travellers

	Among Americans		Change Since May '04	
	May '04	May '05	-	+
	Nature & outdoors	7.7	7.5	-0.2
Touring trip	7.1	7.0	-0.1	
Arts, culture & history	6.8	6.7	-0.1	
Big city trip	6.7	6.7		±0.0
Resort trip	6.5	6.4	-0.1	





# Ontario Ratings For Trip Types

Average on 10-point scale among Canadians travellers

	Among Canadians		Change Since May '04	
	May '04	May '05	-	+
Nature & outdoors	8.0	8.0		±0.0
Touring trip	7.3	7.3		±0.0
Arts, culture & history	7.2	7.2		±0.0
Big city trip	7.2	7.1	-0.1	
Resort trip	6.6	6.7		+0.1





# Toronto Ratings For Trip Types

Average on 10-point scale among American travellers aware of Toronto

	Among Americans		Change Since	
	May '04	May '05	May '04	
			-	+
Shopping, restaurants, nightlife	7.5	7.3	-0.2	
Arts, culture & history	7.3	7.3		±0.0
Strolling around to see buildings/sights	7.3	7.2	-0.1	
Family vacation	7.1	7.0	-0.1	
Overall rating	7.4	7.4		±0.0
“Must See” destination	6.8	6.7	-0.1	

# Toronto Ratings For Trip Types

Average on 10-point scale among Canadian travellers

	Among Canadians		Change Since May '04	
	May '04	May '05	-	+
Shopping, restaurants, nightlife	8.0	7.8	-0.2	
Arts, culture & history	7.6	7.6		±0.0
Strolling around to see buildings/sights	7.2	7.0	-0.2	
Family vacation	6.4	6.4		±0.0
Overall rating	7.2	7.3		 +0.1
"Must See" destination	7.0	7.1		 +0.1

# Passport Issues

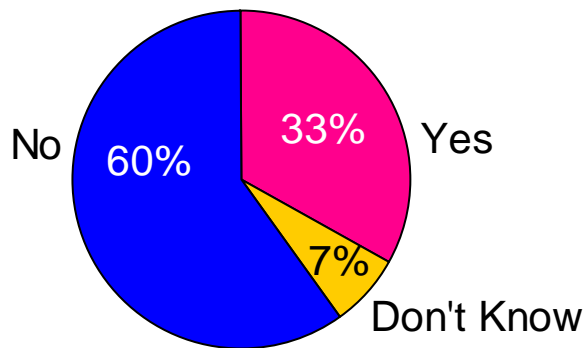
# Cognizance Of Passport Requirements

Percent of adults in each market

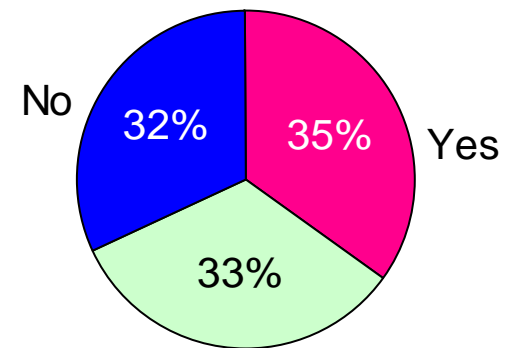
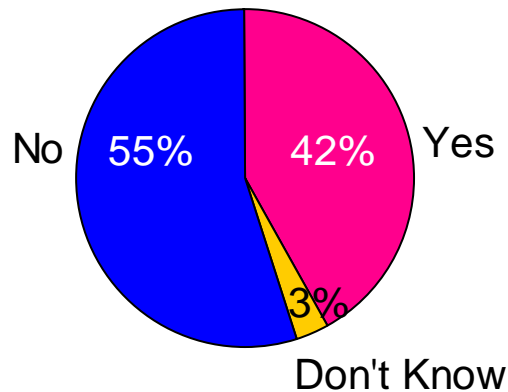
Is a passport currently required to travel between Canada and the US?

Are you aware that in the beginning of 2008 a passport may be required to travel between Canada and the US?

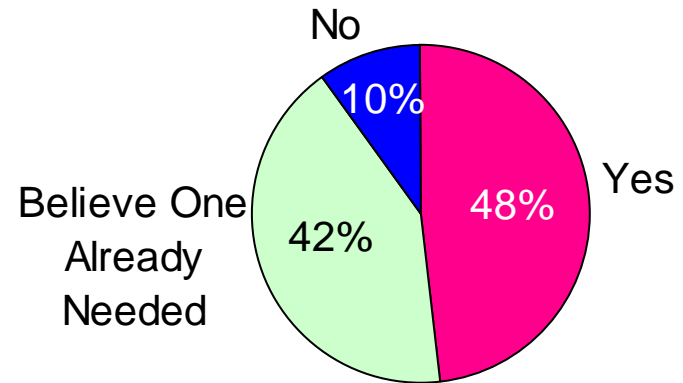
Americans



Canadians



Believe One Already Needed



Believe One Already Needed

# Passport Ownership Incidence

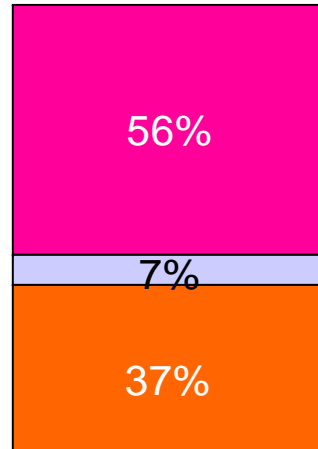
Percent of adults in each market

## Americans:

Have not had a valid passport during past 5 years

In past 5 years but not currently

Currently have a valid passport



## Age at which first acquired passport:

Under 12 years

12%

12 - 17

16%

18 - 29

38%

30 - 49

33%

50+

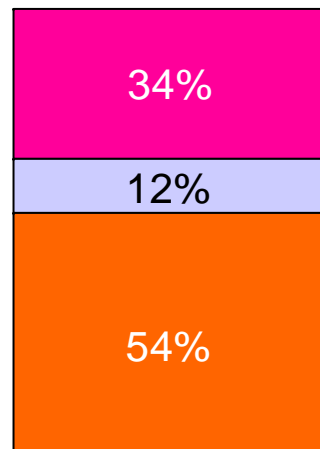
10%

## Canadians:

Have not had a valid passport during past 5 years

In past 5 years but not currently

Currently have a valid passport



Under 12 years

16%

12 - 17

16%

18 - 29

38%

30 - 49

24%

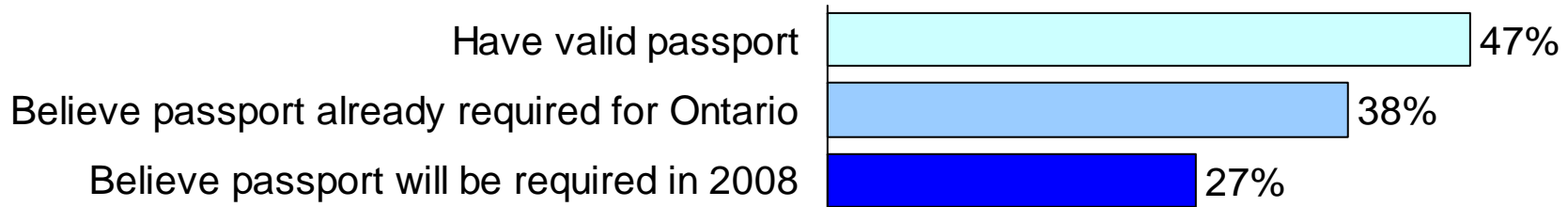
50+

6%

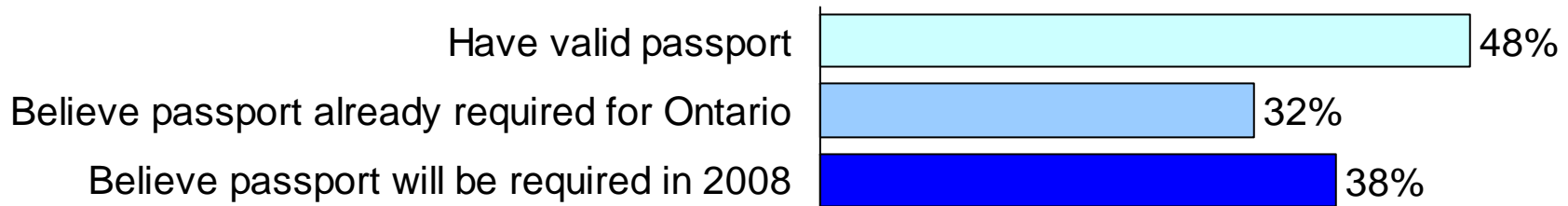
# Potential Impacts Of Passport Requirements On American Travel To Ontario

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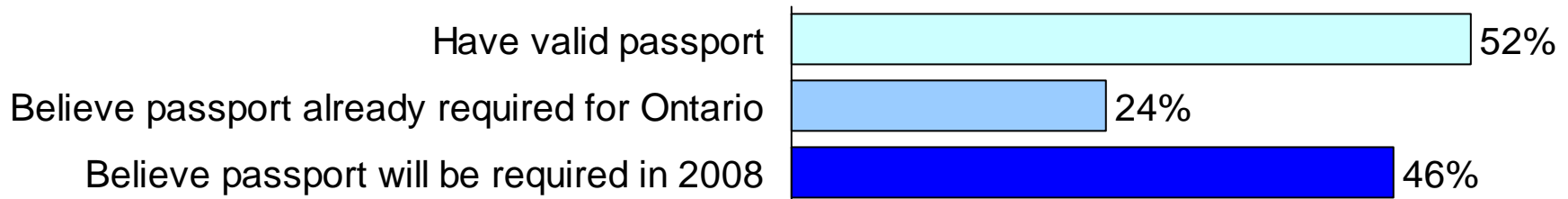
## Percent Of US Travellers 18 - 34 Years:



## Percent Of US Travellers 35 - 54 Years:



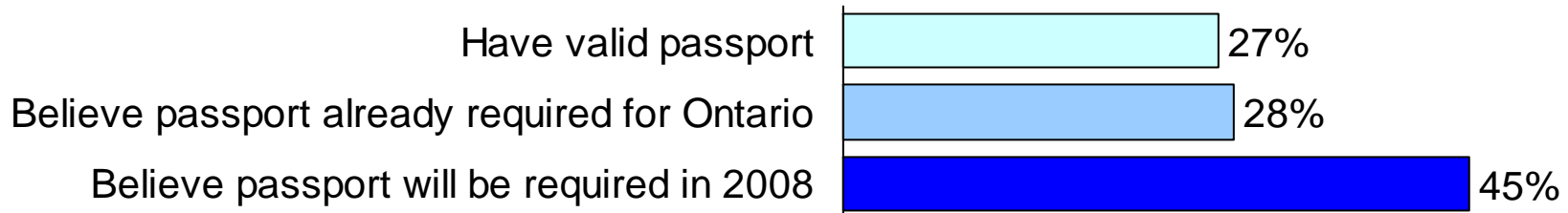
## Percent Of US Travellers 55 Years+:



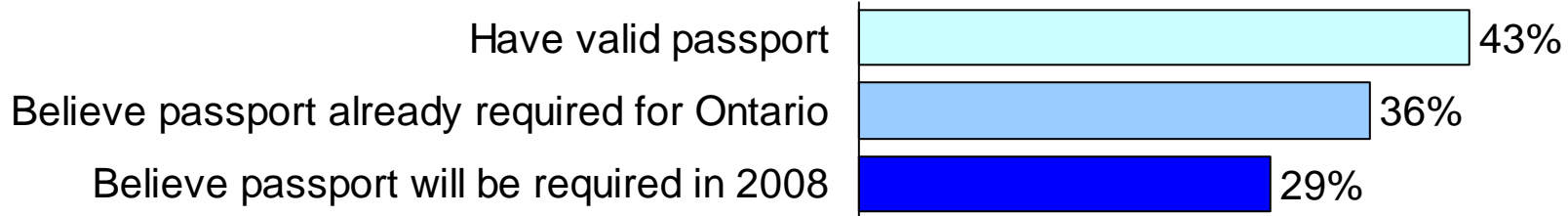
# Potential Impacts Of Passport Requirements On American Travel To Ontario

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## Percent Of US Residents In Near Markets:



## Percent Of US Residents In Mid Markets:



# Summary And Implications

# Summary

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- The most recent wave of tracking suggests that intentions to travel to Ontario during the Summer season have changed little in relation to those recorded in May of 2004.
  - Intentions may have declined marginally in the US and within Ontario itself, and there is also some evidence that fewer residents of Winnipeg are committed to traveling to the province.
  - At the same time, there is directional evidence that those residing in the major urban centres of Quebec may be somewhat more open to visitation than they were last year.
- As is typically the case, interest in taking a trip to Ontario has been building in Western New York (especially Rochester and Syracuse) during the Spring months with the approach of the high volume Summer season. However, in Rochester, at least, interest has not reached the peak noted one year ago when residents were anticipating the establishment of a new ferry link to Toronto.

## Summary (cont'd)

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- With regard to other regions of the US, findings indicate that circumstances have improved across most of the northern and western Mid-Market regions. Directional year-to-year gains in travel intentions have been recorded in Minneapolis and Chicago, and a statistically significant increase in expressed interest is noted in Milwaukee.
- In the East, results are mixed. There are signs of improvement in Washington DC and Pittsburgh, but evidence of potential softness in New York City and Philadelphia. Expressed intentions in the key Near-Market cities of Detroit and Cleveland are also directionally weaker than they were one year ago.
- Domestically, a notable lack of momentum is evident in Winnipeg. In fact, an inability to build Summer travel interest during the preceding Spring months goes a long way toward explaining the weaker travel intentions recorded in that city versus May of 2004.

## Summary (cont'd)

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- It is worth noting that much of the weakness recorded within Ontario itself can be traced to declining interest in the rest of the province among Toronto residents. Ontario travel intentions stimulated from outside of the GTA seems more stable.
- There is also evidence that the more youthful segments of the domestic market (younger adults) have grown more resistant to expressing pre-season commitment to travel within the province.
- When turning to imagery, there is no evidence of any real change in impressions of Ontario among either Americans or Canadians. Ontario continues to evoke positive connotations of safety and friendliness with a strong “outdoor/nature” component.
- Challenges continue to exist when attention is focussed on fostering impressions of a high quality product beyond “nature”, the capacity to deliver a unique experience and, importantly, value for the money.

## Summary (cont'd)

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- The point should be made that the apparent lack of buoyancy in expressed intentions should not be taken to mean that Summer travel volumes will fail to grow this year.
  - Rather, it suggests that the market remains potentially volatile and soft.
  - The travelling public continues to be cautious in committing to travel arrangements.
  - The capacity to make travel decisions close to the departure date remains an important dynamic.
    - The availability of Internet planning/booking options has enhanced consumer flexibility in this regard.
  - The pool of potential travellers has likely not grown, but there is still considerable opportunity to achieve greater success in converting intentions to behaviour.
  - This is particularly true since many of the high profile barriers to choosing Ontario have come down.

# Summary (cont'd)

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## Passport Requirements

- Initial findings indicate that the possibility of passport requirements to travel between Canada and the US could dampen Ontario tourism volumes from American source markets.
- Only about half of American travellers who express interest in Ontario or who have visited the province in the past have a valid passport. And, the majority of these individuals recognize that a passport is not currently required to cross the border. This leaves open the possibility that they will curtail visitation at some future date.
- Of particular significance, the incidence of carrying a valid passport is especially low in the critical US Near Markets.

## Summary (cont'd)

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- However, news about the new restrictions appears to be spreading fairly quickly, giving most travellers time to apply for a passport if they so desire.
  - Past behaviour suggests that Americans (and Canadians) tend to acquire a passport when they actually need it (rather than proactively).
  - Passports are often initially acquired later in adulthood.
- By the same token, this makes it all the more critical that the information is communicated and interpreted correctly. A fair number of Canadians and Americans believe that passport restrictions are already in force, with some undoubtedly coming to this conclusion through erroneous interpretation of recent media reports on the issue.
  - This sort of confusion appears to be more prevalent in the more youthful segments of the American travelling problem.

## Summary (cont'd)

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- Of course, since this sort of misinterpretation cuts both ways, the net impact may be less than might be expected on the surface. It could be argued that some Ontario residents may turn to domestic travel if they (correctly or erroneously) believe the US is not an option.
- Apart from what happens in the short term, perhaps the greatest sustained impact of imposing passport restrictions will take place in the psychological realm. The imposition of passport requirements could signal to many US and Canadian travellers that crossing the border will be problematic and much less convenient than has been the case in the past. This mindset could certainly suppress enthusiasm for short, cross-border excursions.

# Some Marketing Implications

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- Act to encourage the dissemination of accurate information about any changes to passport requirements throughout the key US source markets.
- Until any new restrictions take effect, leverage opportunities to convey the message that Americans do not currently need a passport to visit Canada.
- Ensure that Ontario maintains a strong promotional presence throughout each travel season with particular emphasis on the peak summer and shoulder seasons.
- Continue to work toward building a strong network of web-based promotional devices in support of Ontario tourism.

# Some Marketing Implications

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- Retain the reinforcement of stronger consumer value impressions as part of the core marketing mission.
  - By reinforcing the notion that Ontario offers a range of distinctive and enticing travel experiences, even to repeat visitors.
  - Establish a stronger sense of excitement in the breadth of the offering (more than nature and the outdoors).
  - Use feature price packaging in a strategic way to encourage desired travel behaviour (for instance motivating experience with the broader offer).
- Develop a long term strategy to unlock potential in some of the major US Mid Market cities.



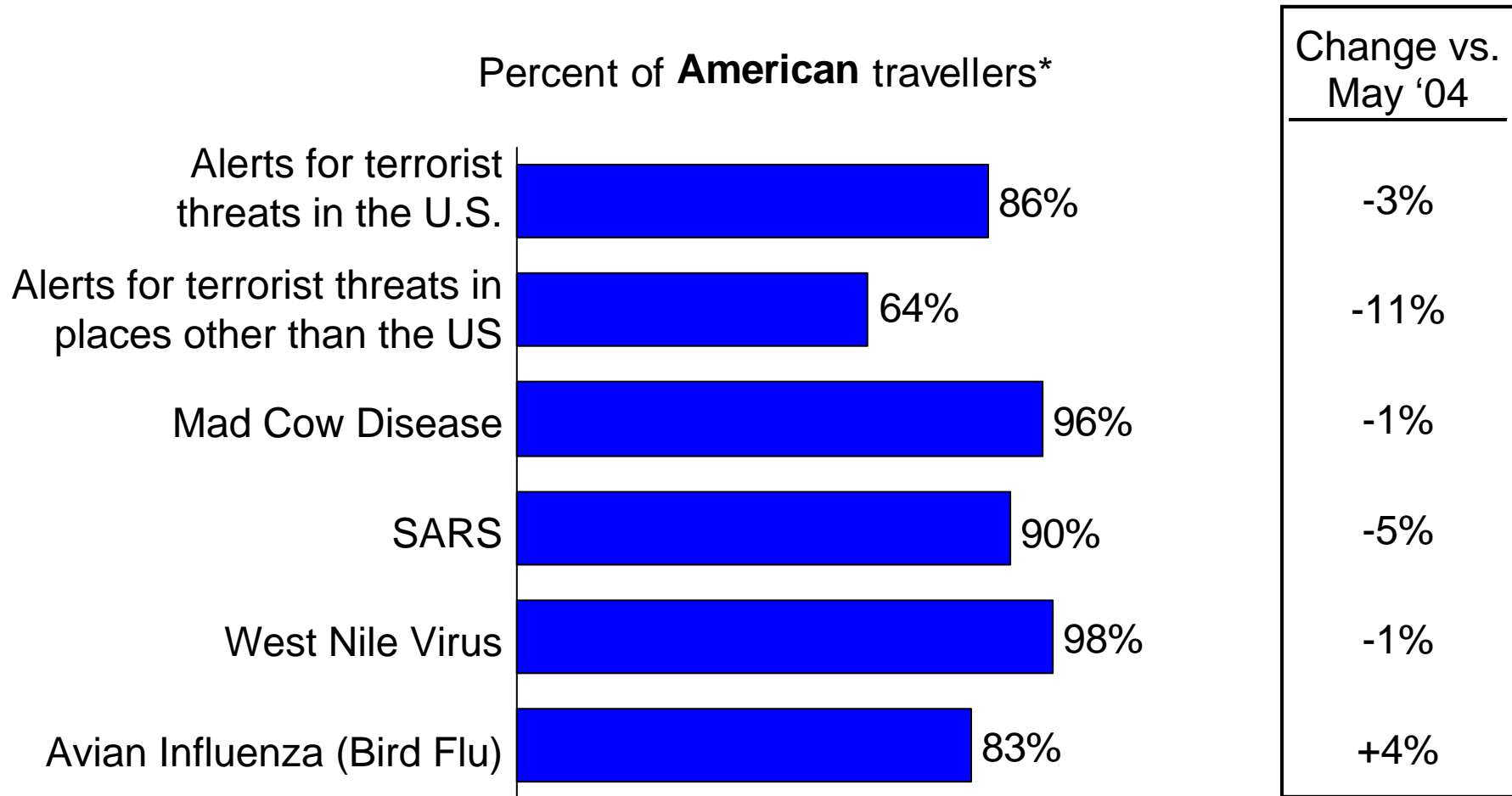
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# Appendix



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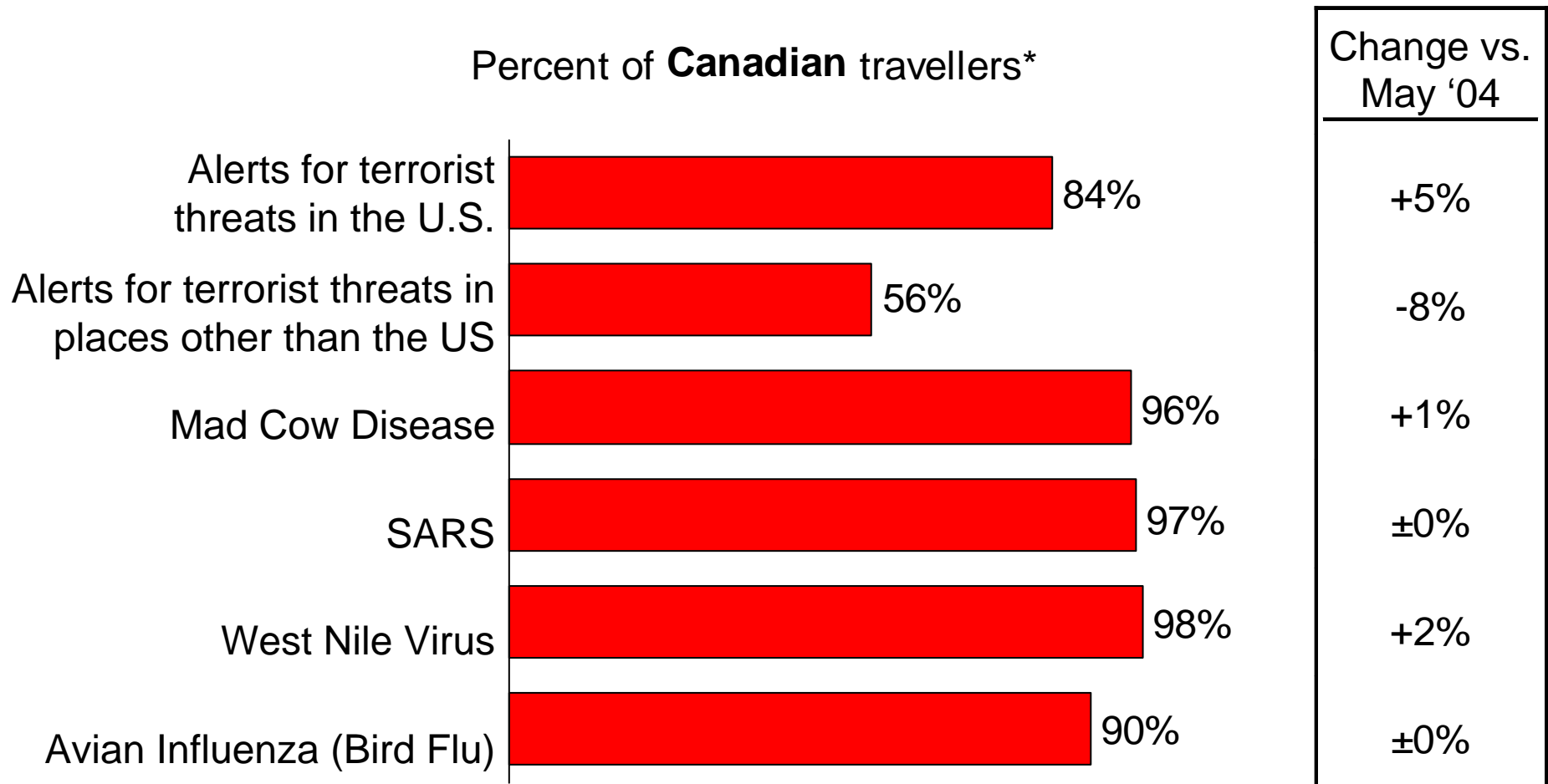
# Prompted awareness of negative events (as of May '05)



\* Have taken an overnight trip in the past two years or will take one in the next 12 months.

Q. Now I'd like to ask you about some specific events that have taken place in the recent past. Have you heard of... ?

# Prompted awareness of negative events (as of May '05)

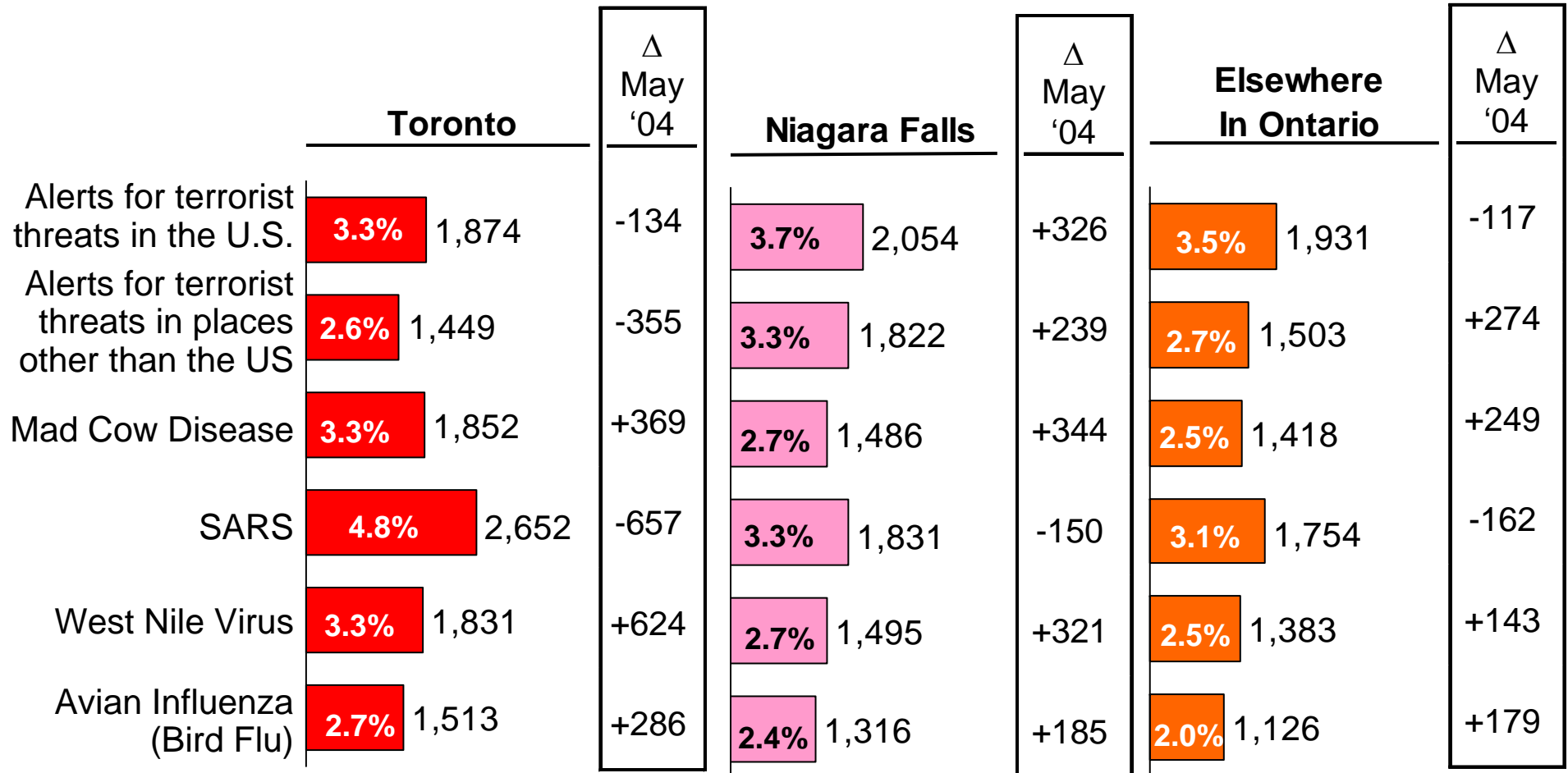


\* Have taken an overnight trip in the past two years or will take one in the next 12 months.

Q. Now I'd like to ask you about some specific events that have taken place in the recent past. Have you heard of... ?

# Impact of negative events on intent to travel to specific destinations during coming season (as of May '05)

Projected number of **American** travellers\* (in thousands) who are less likely to visit each destination in June/Aug

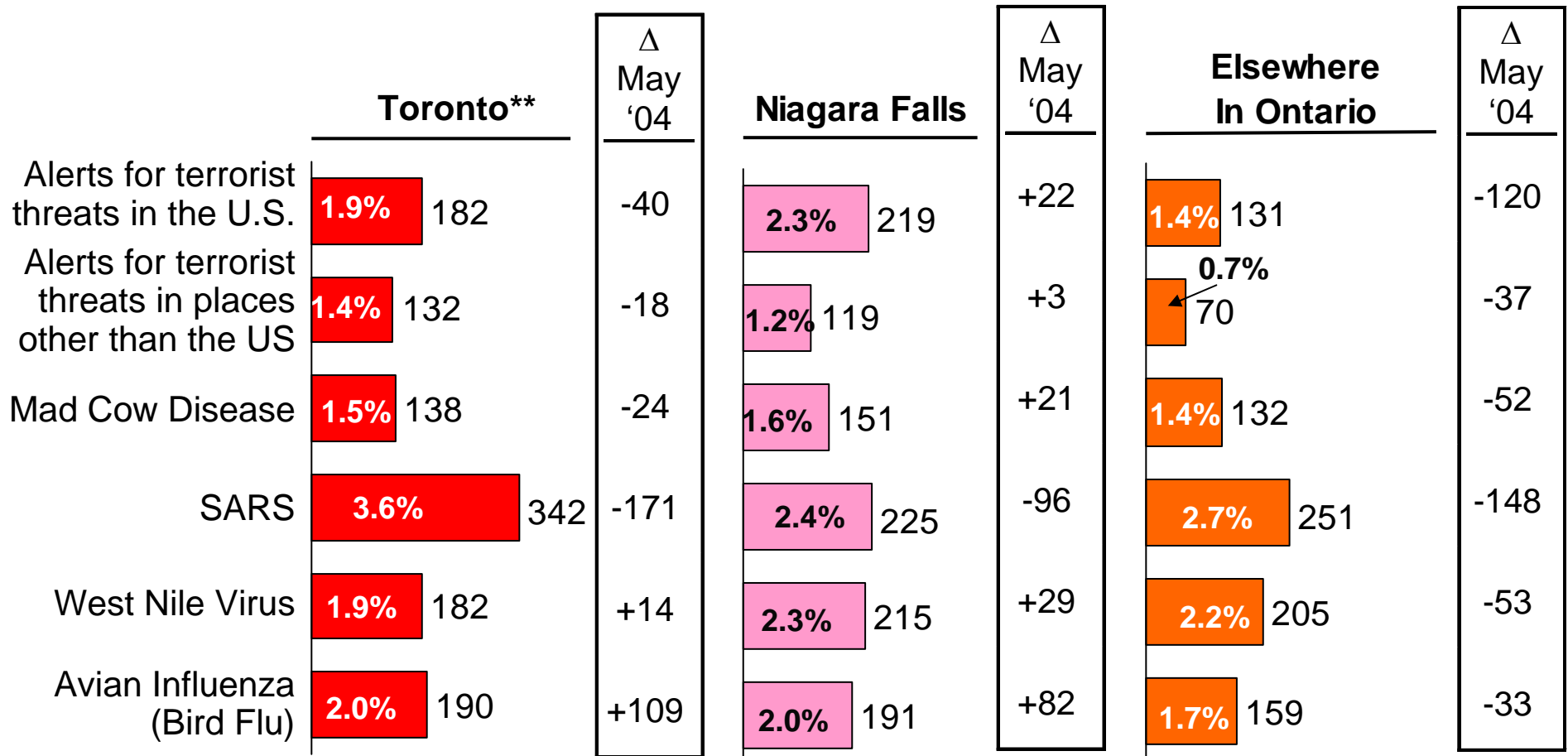


\* Have taken an overnight trip in the past two years or will take one in the next 12 months.

% As percent of US travellers.

# Impact of negative events on intent to travel to specific destinations during coming season (as of May '05)

Projected number of **Canadians** travellers\* (in thousands) who are less likely to visit each destination in June/Aug



\* Have taken an overnight trip in the past two years or will take one in the next 12 months. \*\* Excluding Toronto residents

% As percent of Canadian travellers.



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